SPA Future Thinking

Mobility Aids Research Report

Prepared for: OFT
Ref: jn7962/SI/DJ
Date: August 2011

LONDON OFFICE
Laystall House, 8 Rosebery Avenue
London, EC1R 4TD, United Kingdom
T +44 (0) 20 7843 9777
F +44 (0) 20 7843 9779
E info@spafuturethinking.com
W www.spafuturethinking.com

UK | FRANCE | ITALY

This report was prepared for the Office of Fair Trading by SPA Future Thinking. The views expressed are those of the authors and do not necessarily reflect the views of the Office of Fair Trading.

Contents

Summary

Introduction

Mobility aids can potentially greatly enhance the quality of life of their users, who are often elderly or disabled. However, the sector has attracted many calls to Consumer Direct and interested parties have raised concerns that the market is not working well for consumers.

This report is based on 480 structured telephone interviews and 30 depth interviews with mobility aid purchasers and addresses whether:-

- Consumers are accessing information to inform purchasing decisions
- Buyers are assessing and able to act on the information received in order to make an informed purchasing decision
- Consumers are being treated fairly

It is observable that most purchasers of mobility aids are in late middle-age or elderly, and our research programme did not provide a strong evidence base for those aged under 45.

Accordingly, the terms ‘consumers’ or ‘purchasers’, used throughout this report, will refer to the population of those aged 45 and over.

Are Buyers Accessing Information to Inform Purchasing Decisions?

Overview

Most purchasers were buying a mobility aid without having any previous experience of purchasing that type of aid. While most did claim to have obtained information to aid them with their purchase decision many made purchases without the benefit of:-

- Expert medical advice
- Comparing different brands/models
- Comparing different suppliers

Therefore factors (such as consumers considering a variety of products and suppliers and their previous purchasing experience) which help drive competition in other markets were partly absent in the mobility aids market.

Previous Experience

Consumer research formed part of an OFT market study undertaken to explore how well the mobility aid market is working for consumers. The research encompasses wheelchairs, mobility scooters, stair lifts, hoists, bath aids, adjustable beds and specialist seating.

In most markets, most purchasers have previous experience of buying the type of product being bought, and this experience will aid them in choosing an appropriate brand/model and supplier. They may also have in their minds a pricing framework to help them assess what is good or poor value.

Those with previous experience of buying a particular type of product might be expected to start with greater knowledge than those with no prior experience.

In contrast, those lacking such experience may be unsure of whom they should contact or visit, find it difficult to assess the quality or practicality of products they are shown and have little idea of what products might cost. They may waste time contacting suppliers who are unable to help them and they will have a limited frame of reference on which to base a purchasing decision.

In the mobility aids market, most purchasers had no previous experience of buying the type of product bought on the last occasion.

Only 22% of those buying for themselves said they had previous experience of purchasing the specific type of mobility aid they purchased on this occasion.

Just under half (47%) had previous experience of purchasing any mobility aid so they may have had some prior knowledge of suppliers or local mobility aid retailers. However, over half (53%) had no experience of buying mobility aids so they were likely to be unfamiliar with local retailers and hence they were unlikely to have any views regarding which retailers had a broad product range, helpful staff or competitive prices. Where potential buyers already know which shops are likely to provide the best service and value for money they can save time by concentrating on the best shops. A potential purchaser who lacks this knowledge may waste time visiting or making enquiries of unsuitable retailers and may fail to contact retailers who could have helped them.

Among those who were buying a mobility aid for another person, only 44% had previously been involved in purchasing any mobility aid. This includes 17% of the sample who had previous experience of purchasing the mobility aid in question.

Regardless of the types of mobility aid being considered, most purchasers were inexperienced in choosing and purchasing these products.

Expert Advice

When buying an unfamiliar product (particularly one which will help them to cope with a disability), expert medical advice is potentially valuable and important but this was obtained by only a minority of the purchasers surveyed.

Without medical advice, consumers may buy products that at first sight appear suitable but may not be the best option for the individual.

Around three in ten purchasers (for themselves or others) said that before making their purchase a health professional provided advice or assessment as to the suitability of a mobility aid for their needs.

So most buyers were choosing mobility aids without the benefit of experience of previous purchases and most were buying without the benefit of expert medical advice.

Accessing Pre-sale Information

During the course of their interview, the vast majority of purchasers mentioned one or more information sources which helped them reach their decisions as to what to purchase. Retailers, the internet and brochures were the three sources mentioned most frequently by respondents.

However, as the following section reveals, many purchasers failed to compare suppliers or products, focussing on a single product and/or only investigating a single supplier.

This means they will have based their decision on a limited choice of products and if their choice is limited they may be less likely to find the most suitable mobility aid for their needs. If they only consider a single supplier they will be limiting themselves to the products stocked or sold by that supplier, and they may pay higher prices than if they had gone elsewhere.

Comparing Other Suppliers/Models

Around half of all purchasers (52% of those buying for others and 47% of those buying for themselves) said, before making their purchase, they had made enquiries, visited or investigated other possible suppliers, those who did so typically visiting other stores or making telephone or internet enquiries.

Among those buying for themselves only 49% investigated alternative brands or models. This figure was significantly higher (66%) among those purchasing for others.

Fewer (28% and 39% respectively) considered products that were in a different price range to the one eventually purchased.

Most purchasers (72% of those buying for themselves and 61% of those buying for others) only considered products at a similar price/value to the one they eventually bought so they were probably looking at products which were quite similar to each other, rather than considering a broader range of cheaper or more expensive items.

Furthermore, as only around half investigated other suppliers and only half those buying for themselves checked other products, many purchasers may have lacked an appropriate frame of reference when looking at prices.

This was illustrated in the depth interviews we conducted where we found very little detailed knowledge of prices, and understanding of what people might be able to buy for lower or higher prices.

A recurring theme in the depth interviews was that a first-time purchaser of a mobility aid might be initially unsure that the aid would make a difference to them. If an in-home salesperson convinced them the mobility aid they were offering would meet their needs and improve their life they might simply buy that aid without investigating whether other aids were better or more competitively priced. The decision-making process some purchasers went through was whether or not to buy a specific product rather than whether to buy that product or a different product. In these circumstances, potential purchasers were not sensitive to the price of the product.

In the quantitative study, only a quarter of those buying for themselves through an in-home seller compared products. Those who buy as a result of someone visiting their home may do so because it is difficult for them to visit a shop and many do not have online access. Comparing suppliers and products may be potentially challenging for them. It is a concern, therefore, that sellers are visiting their homes and offering them a single product. The customer's choice is limited to buying the product offered or not buying it. Consumers are being asked to consider making a purchase without an appropriate frame of reference. This not only potentially increases the risk of customers paying too much and/or buying an unsuitable product but may also reduce the need for sellers to ensure their products are high quality and competitively priced.

The likelihood of someone comparing other brands/models varied considerably depending on the sales channel through which they made their purchase. Most of those buying online or in a shop did compare other models. Even so, substantial numbers (around one in three of those buying in a shop) failed to do so.

This study suggests that in-house purchases could represent just over 10% of all purchases of mobility aids. While only a relatively small minority of purchases have been made through this channel they have featured prominently in complaints to OFT. The evidence of this survey, albeit on small sample sizes, was that those buying in-home were more likely than those buying through other channels to be concerned about elements of the purchase process or with the product purchased and the price they paid. Lack of product choice would have made it more difficult for those buying in-home to make an informed choice.

Purchase Decisions

Competition in markets can be driven more effectively where consumers have the knowledge, information and experience to make effective and appropriate purchasing decisions. The likelihood of purchasers making sound decisions will be increased where:-

- Purchasers have previous experience of buying that type of product
- They have compared a number of different products through different suppliers
- In the mobility aids market, consumers are also more likely to make suitable purchase decision where they have received expert medical advice

The likelihood of purchasers making appropriate purchase decisions will be increased by the two factors above and also by receiving expert medical advice in relation to their purchase.

However, very few purchases (less than 5%) were made by people benefitting from previous experience, comparison of products/suppliers AND expert advice.

In fact, among those buying for themselves, 21%, and among those buying for others, 16% of those interviewed, were first-time buyers of the mobility aid in question who purchased without medical advice and without comparing alternative products or suppliers. Therefore, around one in five made purchase decisions which appear to have been based on very limited information.

Testing

In the absence of previous experience, medical advice or comparing products/suppliers the importance of thorough testing of the products being chosen becomes potentially more important for the consumer. Testing may help the consumer to confirm whether –

- The product meets their needs
- It fits/is comfortable
- They can easily operate the product

Almost seven in ten of those buying for themselves or others said they tested the product before buying and for mobility scooters the proportion was around nine in ten. Even so, this leaves three in ten of all purchasers and around half those buying bath aids, stair lifts or adjustable beds who did not test the product they bought.

Are Buyers Assessing and Able to Act on the Information Received in Order to Make an Informed Purchasing Decision?

Overview

Most purchasers felt they had bought a product that was suitable for their needs at a price they were happy with. But fewer than three in ten of those buying for themselves used the internet to help them research their purchase decision and purchasers generally had very limited frames of reference, many saying their choice of products and/or suppliers had been limited. This can make it difficult for a purchaser to know whether they have bought an appropriate product and paid a fair price.

The previous section demonstrated that while most purchasers claim to have found some information to support their purchasing decision many did not compare products or suppliers and most reached their decisions without the benefit of:-

- Previous experience
- Expert advice

In considering whether people assessed and acted on information we consider:-

- The extent to which purchasers felt they had a choice of products and suppliers
- Their perceptions of how easy or difficult it was to find and use information to assist their purchase
- The range of factors they took into account in making their decision
- The extent to which with hindsight, they would have liked additional information to aid their decision, or they discovered information they had been given to be inaccurate
- The extent to which they felt they had made an appropriate or inappropriate purchasing decision

The profile of those buying for themselves is also relevant with around three in ten aged 75 or over, and seven in ten belonging to social grades C2DE. (These people live in households where there is no wage earner or where the chief wage earner is in a manual occupation. People living in such households tend to have lower than average incomes and educational attainments.)

Just under half of off all those buying themselves had internet access. Only 29% of those buying a mobility aid for themselves had internet access and used it to search for information on mobility aids.

Being elderly, low social grades and low levels of internet access and usage are all factors associated with individuals struggling to or disinclined to engage with particular markets. (For example research undertaken for Ofgem and others over many years shows levels of proactive switching of energy provider are much lower among older people, especially those with no internet access)

Did Purchasers Feel They Had a Choice of Products and Suppliers?

If consumers feel they have a very limited choice of suppliers, they may be less likely to believe, or be less confident that they have bought a suitable product at an appropriate price. And if there are very few suppliers in a market competitive pressures to deliver good products and service at competitive prices may be lessened.

In fact only around half the purchasers made enquiries to, visited or investigated other possible suppliers.

Furthermore, around one in ten purchasers said they felt they had no choice of suppliers and one in four said they either had no choice at all or not very much choice. These high proportions reflect the fact many had no internet access as those who used the internet to find information to aid their purchase decision were less likely to say they had no choice or not very much choice. Depth interviews highlighted that it was difficult for some people with limited mobility to visit different suppliers and this may have contributed to them feeling they had little choice of suppliers.

Similarly, many felt they had a limited choice of products that might meet their needs. Those buying online were less likely to take this view – but they represented only a small proportion of all purchasers.

Among those buying for themselves 9% said they had no choice of product, 29% that their choice was limited (a little or not very much), while 9% were unsure of how much choice they had. Only just over half those buying for themselves or for others said they had a lot of choice of products.

This indicates that many customers were not comparing products or suppliers and that many believed they had a limited choice.

Did Consumers Struggle to Find Information that Helped with the Purchase?

When asked whether it had been easy or difficult for them to obtain information to help with the purchase only 5% of those buying for themselves and 3% of those buying for others said it had been difficult to obtain information. Despite their claimed problems, those finding difficulties were at least as likely as others to have compared suppliers and/or products so their difficulties were not so great that they were prevented from comparing suppliers or products.

The same pattern was true in relation to ease of comparing different brands or models. While sizeable numbers did not compare products, among those who did fewer than 5% buying for themselves and around 11% buying for others said it was fairly or very difficult to compare different mobility aid brands or models.

The survey therefore provided no evidence that substantial numbers of consumers were seeking information but failing to find it.

However, almost 14% of those buying for themselves asserted they had not needed information to help with the purchase, and among those needing to make an immediate purchase this figure was 17%.

Therefore, while it appears that those who seek information are generally able to find some information to help them, significant numbers are not even trying to find information.

Were Consumers Clear What they Wanted From the Mobility Aid?

Almost all purchasers (97% of those buying for themselves and 94% of those buying for others) claimed they were clear about what they needed from the mobility aid. Even with the advantage of hindsight, and despite the fact only three in ten had expert medical advice, very few admitted to not having been clear about what they needed.

Factors Taken into Account When Making Purchase

Most interviewees claimed to have taken into account functionality and quality when purchasing their mobility aid.

Fewer (only around two in three) took price into account and this proportion was lower still among those who failed to compare different suppliers or products.

With a sizeable minority of purchasers failing to consider price when making their purchase, pressure on suppliers to ensure their prices are competitive is greatly reduced.

The main sources of information on factors such as functionality, quality and price were retailers and the internet.

A minority were influenced by reputation of manufacturer, supplier or brand. With most purchasers buying this type of aid for the first time, they were doing so without the benefit of knowing much about the reputation of different manufacturers, brands or suppliers.

Maintenance Costs

In the quantitative study around one in four purchasers for themselves or others reported that they were already aware of any costs to maintain the mobility aid they purchased. Where potential buyers were not previously aware in only one in three cases did they report being made aware before purchase. This meant that around half the purchasers made their purchase without being aware of likely costs to maintain their mobility aid.

Around three in ten of the purchasers who were aware or were made aware of maintenance costs said this knowledge encouraged them to choose one product over another. Therefore some of those unaware of maintenance costs were deprived of information which might have influenced their purchase decision. In these circumstances the total costs (purchase price and maintenance costs) may have turned out to be more than they were expecting.

Incomplete or Inaccurate Information

Some purchasers (8% of those buying for themselves and 7% of those buying for others) said there was information they did not have when they made their purchase which would have been helpful to them in making their decisions.

The most common complaint mentioned spontaneously related to lack of product manual/information (cited by 2% across all purchasers). A similar proportion mentioned cost of replacement parts/service charges while 1% would have liked to have known more about a maintenance plan. There were also isolated comments about ease of use.

Therefore, we did not find substantial numbers saying, after their purchase, that they wished they had had other information at the time of their purchase.

Nevertheless, in response to other questions, a minority of purchasers revealed a degree of dissatisfaction with the information provided.

Around 6% of all purchasers said:-

- They were not provided with accurate information on the quality, function and price of the product
- Some of the information given out by the salesperson/supplier turned out to be inaccurate

Among those buying for themselves, 2%, and 5% of those buying for others, said they were dissatisfied with the product information before the purchase was made.

The numbers of those complaining of inadequate or inaccurate information were too small to provide statistically significant differences by sales channel, but customers buying from in-home sellers were over-represented among those critical of the information provided.

The survey revealed instances of customers buying as a result of an in-home visit who were shown one product only from a single supplier. If they were provided with inadequate or inaccurate information on the one product they did see, an informed product choice would become impossible.

Perceived Suitability of Product Purchased

Many factors, including lack of familiarity with the products and failure or inability to compare products/suppliers will have made it challenging for purchasers to assess accurately the suitability of the product they purchased.

Nevertheless, the vast majority (95% of those buying for themselves and 97% of those buying for others) considered the product purchased to be very or fairly suitable for their needs.

While few purchasers bought something they now consider to be unsuitable many more felt their product was only 'fairly' suitable. So 23% of all purchasers bought a product they did NOT rate as 'very suitable'.

Most purchasers (well over 80%) were satisfied with the value for money and the purchase price. Around 80% were satisfied with the overall cost of their mobility aid (including repairs or servicing).

These figures suggest relatively few purchasers regretted their purchase decision; but many purchasers were basing their decision on such limited information that we cannot conclude that purchasers were making appropriate and informed decisions.

Consumers' perceptions of the fairness of sales practices

Overview

The research explored customers' perceptions of sales techniques, pricing clarity and views on whether they had been treated fairly.

The vast majority of purchasers felt the purchase process was fair but the survey identified sizeable numbers of consumers who felt the process was unfair and/or felt they had been pressured by salespeople. Furthermore, depth interviews revealed some had felt pressured by companies they chose not to buy from.

There were also numerous instances of purchasers saying their cancellation rights had not been explained and that they had not received a written agreement reflecting what was agreed verbally.

Consideration of whether customers feel they were treated fairly is based on:-

- Purchasers' own perceptions
- Issues such as the consistency of information given to purchasers and whether their cancellation rights were explained

Customer Perceptions of Being Treated Fairly/Pressured

The vast majority of purchasers confirmed that the purchase process was fair. However, 3% of those buying for themselves and 7% of those buying for others disagreed that the process was fair.

OFT has been concerned for several years that elderly, vulnerable adults are being targeted by companies or individuals who make unsolicited calls or visits, knowing that the individuals may be persuaded to make a purchase, and possibly an unsuitable purchase.

13% of those buying for themselves and 11% of those buying for others said they had received an unsolicited telephone call or visit from a salesperson which led to them purchasing their product.

Some purchasers admitted to feeling pressured with 6% of those buying for themselves feeling pressured to try the product and 5% feeling pressured to purchase a maintenance contract or extended warranty by the salesperson or supplier.

Among those buying for others the equivalent figures were slightly higher at 7% and 8%.

Therefore, by their own admission, a minority of purchasers felt pressured and/or unfairly treated.

Furthermore, there were instances of customers making purchases they later considered inappropriate, who did not say they were treated unfairly, but whose treatment by the sales reps made it more difficult for them to make an appropriate, informed decision. This is explained more fully below.

There was also an instance of a depth interviewee describing a sales rep as not pushy despite the rep making a time-limited offer for an add-on product.

Completeness/Accuracy of Information

While only a small minority of purchasers said they were unfairly treated there were others whose treatment might be considered unfair. For example, the policy of some suppliers appears to be to avoid giving any indication of costs over the phone and to wait till they meet the customer in-home before suggesting a cost.

They adhered to this policy even when a single basic product was being purchased which required no adjustment for the individual purchaser.

A number of depth interviewees said they had no idea of the likely price before being visited, and they had less opportunity to compare prices.

Some depth interviewees said they were not initially shown printed prices and this suggests sales reps may have been given a degree of freedom when stating selling prices to customers. The depth interviews revealed instances of sales reps claiming they were giving the customers a discount, although the customers could not be sure the product was ever sold at its non-discounted price.

A minority of respondents (7% of those purchasing for themselves and 5% of those buying for others) said they had been provided with inaccurate information by the salesperson.

Written Agreements/Cancellation Rights

Around three in ten purchasers denied being provided with a written agreement which reflected what was verbally agreed with the supplier/salesperson and for all sales channels, there were significant proportions claiming not to have been supplied with such a written agreement.

Of those not buying from a retail outlet, almost one in four agreed that their cancellation rights were not made clear by the supplier or by the contract they received.

A few purchasers said they had been unable to return the product, even though they were within their cancellation period.

Introduction

Background

Mobility aids are products used to assist those who experience difficulty in moving around freely and independently due to an age related, medical or other condition. They are important products for their users, who include elderly and disabled people, as they can significantly improve the quality of their lives, including their safety and well-being. For many consumers, these products are a necessity.

This sector has attracted a large number of calls to Consumer Direct (the OFT-managed telephone and online service) by purchasers. In addition, key interested parties have raised concerns that the sector is not working well for consumers.

On 19 November 2010, the OFT announced its intention to conduct a market study into this sector and sought views on its proposed scope. It received over 100 responses in which interested parties confirmed their concerns about this sector.

The study covers wheelchairs, scooters, stair lifts, bath aids, hoists and adjustable beds and specialist seating and considers three key questions:-

- Are consumers able to access, assess and act on the right information so they can purchase the right mobility aid for them and help drive vigorous competition amongst firms?
- Are consumers being treated fairly by traders and suppliers, and if not, what can best be done to address this?
- Is competition in the wheelchair sector working well for consumers?

Many consultation responses raised concerns about consumers' inability to make informed decisions when purchasing a mobility aid, which could lead to them being overcharged, purchasing low quality products, or purchasing products that either fall short of or exceed their needs. Concerns were also raised about traders' or suppliers' use of high pressure sales tactics, especially in the home, failure to use clear terms and conditions before the purchase decision is made and failure to observe cancellation rights.

Other concerns put forward included a lack of competition in the wheelchair sector resulting from the structure of the market, the behaviour of some firms and public bodies' decisions as purchasers and suppliers.

The OFT is currently in the process of considering all of these issues as part of its study to examine whether the markets are working well for consumers, and where it has concerns, to consider how they can be tackled.

Research Aims

This consumer research forms an integral part of the market study and aims to address three key areas:-

- Whether consumers in this sector are **getting the right information** to enable them to make informed choices and to drive vigorous competition amongst firms
- Whether consumers in this sector are **able to assess and act on the information provided** so as to make informed choices on mobility aids and to drive vigorous competition amongst firms
- Whether consumers in this sector **are being treated fairly**

OFT required detailed information from those purchasing a mobility aid in the past three years:-

- Demographics of purchaser/end user
- Details of mobility aid purchased and extent to which other products were considered and compared
- Details of who funded the purchase
- Details of the sales channel used to purchase the mobility aid, and investigation of advantages and disadvantages of this channel
- Details on the duration of the purchase/supply process and whether there were any factors that limited the time the purchaser was able to spend considering options
- Price paid for the mobility aid
- Intended use of the mobility aid
- Factors taken into account when choosing mobility aid
- Ease of finding information to help with the purchase
- Whether the consumer compared different brands/models and ease of doing so
- Perceived breadth of choice of products/suppliers
- Whether/where the consumer tested mobility aid purchased
- Satisfaction with mobility aid purchased and whether it was felt to be appropriate

The OFT also wished to ascertain whether the consumer was subject to:-

- Sales tactics perceived by consumers to be high pressure or misleading
- Trader failing to observe cancellation rights
- Trader failing to use terms and conditions that were sufficiently clear and fair, and provided before purchase
- Using mass-marketing techniques resulting in ‘cold-calling’ the consumer

The OFT required this research in order for it to:-

- Identify whether there are problems in the sector and if so, what factors cause these problems
- Assess the impact on consumers of the problems identified
- Examine how any problems identified might be remedied

Methodology

Overview of Approach

In order to achieve a statistically reliable, robust evidence base on which to base its decision making, as well as gain a more in-depth understanding of issues affecting consumers, a multi-stage research programme was developed. This included:-

- Depth interviews to help feed into the development of a quantitative survey
- An omnibus survey with a nationally representative sample of UK adults to gauge the incidence of those purchasing mobility aids (either for themselves or others) and the types of mobility aids consumers purchase
- A quantitative survey with those who had purchased mobility aids within the last three years in order to gain an understanding of their experiences
- Follow up depth interviews with those who took part in the quantitative survey to gain a more in-depth insight into the process of purchasing a mobility aid and the issues consumers encountered

Stage 1 – Pre-survey Depth Interviews

The first stage of the research was to carry out five face-to-face depth interviews with people who had purchased a mobility aid in the last three years. These interviews were carried out before the quantitative questionnaire was agreed and piloted to ensure there were no major issues that we had missed and to provide advance indications of whether any of the question areas were likely to prove problematic.

A topic guide was developed by SPA Future Thinking in liaison with OFT and covered the key areas we envisaged including in the quantitative survey. The depths were carried out by the core project team involved in developing the quantitative questionnaire and took place on 15 – 17 March 2011. The table below shows the profile of those who were interviewed:

Mobility aid purchased	Product purchased for	Gender	Age
Scooter	Own use	Female	45-54
Wheelchair	Own use	Male	45-54
Various	Someone else	Female	45-54
Wheelchair	Someone else	Male	25-34
Various	Someone else	Female	45-54

Stage 2 – Nationally Representative Omnibus Survey

Two waves of research were carried out with a nationally representative sample of UK adults using a telephone omnibus[1]. The first wave of the omnibus took place on 11 March with the second wave taking place on 18 March. In total 2,008 interviews were completed.

The aim of the omnibus was to establish:-

- In the last three years how many people had purchased, or been closely involved with the decision making process leading to the purchase, of any of the following mobility aids either for themselves or on someone's behalf
    - Wheelchair
    - Specialist wheelchair seating
    - Mobility scooter
    - Hoist
    - Bath aids (for example, bath lift, shower cradle, bath seat) not low value products such as simple grab rail or bath step
    - Stair lift
    - Adjustable bed
    - Specialist seating (for example the following chairs for mobility problems: riser recliner chair, chair with tilt-in facility)
- Through which sales channels the mobility aids were purchased

The questionnaire was developed by SPA Future Thinking in conjunction with the OFT and a copy is included in the Appendices. The results of this omnibus were used to weight the data from the quantitative survey with purchasers of mobility aids. This is discussed in more detail in the next section.

[1] The research was carried out using the ICM telephone omnibus. It runs every week interviewing a nationally representative sample of 1,000 GB adults aged 18+.

Stage 3 – Quantitative Survey with Purchasers of Mobility Aids

The quantitative survey with purchasers of mobility aids was carried out using CATI (Computer Assisted Telephone Interviewing) from FDS's telephone centres. In total 480 interviews[2] were achieved with people who in the last three years had purchased, or been closely involved with the decision making process leading to the purchase, of any of the relevant mobility aids either for themselves or on someone's behalf. Interviewing took place on 18 – 29 March 2011.

Questionnaire

The questionnaire was initially developed by OFT and further refined in conjunction with SPA Future Thinking. The questionnaire was split into separate sections to capture detail on consumers' experiences throughout the purchasing process:-

- Background details of purchaser
  - Reasons for purchase
  - Whether had previous experience of buying mobility aids
  - How quickly purchase needed to be made
- Background details about the type of mobility aid purchased
- Details about the product
  - Price
  - Whether had to be specially made
- Pre-purchase information
  - Where obtained information to help with purchase
  - Most helpful channel
  - Whether received advice from a healthcare professional
- Sales channel
  - Where product purchased
  - Benefits/disadvantages of preferred sales channel
- Choice
  - Whether made enquiries of/visited other suppliers

[2] The analysis in this report is based on 458 interviews with individuals known to be aged 45 or over. Reasons for this are explained in the Data Processing and Weighting section on page 27.

- Whether compared different brands/models
- Perceived ease/difficulty of finding information to help with purchase
- Factors taken into account when choosing product

- Point of sale
  - Whether/where mobility aid tested
  - Whether made aware of repair/maintenance costs
  - Whether informed about cancellation rights
  - Whether felt pressured by salesperson
  - Whether provided with accurate product information
  - Whether sales process perceived to be fair
- Post sales experience
  - Satisfaction with product purchased and price paid

A copy of the questionnaire is included in the Appendices.

Sample

Sample for the telephone survey was provided by an approved suppler, Sample Answers. Three discrete samples were used for this survey:

- A random digit dialling (RDD) sample of residential telephone numbers across the UK
- Contacts from Sample Answers database of adults with mobility issues
- Contacts from Sample Answers database of adults aged 45+

The RDD sample generated a random sample of UK households. SPA Future Thinking has undertaken many previous studies using RDD where the sample achieved was in line with UK population figures so this is a proven method of achieving a representative adult or household sample. Mobility aid purchasers identified and interviewed through such a source would be expected to be representative of all mobility aid purchasers.

Therefore, an element of the survey was carried out using RDD to assist in the profiling of purchasers. However, as it was expensive in terms of costs per full interview to screen eligible respondents using RDD, it would not have been cost-effective or practical to carry out the entire survey using RDD sample.

Therefore some of the interviews were carried out using Sample Answers' database of adults with mobility issues. This was the most efficient method of interviewing those who had purchased mobility aids for themselves as more of these contacts qualified for interview. Because those aged over 45 were deemed more likely than younger respondents to purchase mobility aids for themselves or on behalf of someone else, a targeted sample of people aged 45+ was also used.

The table below shows the total number of interviews achieved with each of the sample types:-

Sample	Interviews
RDD	81
Mobility issues sample	269
Aged 45+ sample	130
Total	480

At the analysis stage, results were analysed separately for:-

- Those purchasing a mobility aid for themselves
- Those involved in the purchase of a mobility aid for another person

Data Processing and Weighting

Weighting has been applied to each of these two data sets to match the age profile of mobility aid purchasers aged 45+ in the omnibus survey:-

	Buy for Self	Buy for Someone Else
45-54	10.2%	35.0%
55-64	18.4%	32.2%
65+	71.4%	32.8%

Most purchasers of mobility aids are in late middle-age or elderly. This was confirmed by both the omnibus and the RDD elements of the ad hoc study. Only 21 individuals aged under 45 were picked up in the ad hoc study and these were excluded from the analysis. Had they been included and weighted, their results could have distorted the overall results.

A sample profile is included in the Appendices which shows the actual number of interviews achieved against the weighted data.

Interpretation of Data

It should be noted that results are based on a national sample of individuals – not a census of all individuals. This means all data are subject to sampling errors.

The table below shows the statistical reliability of results for a total base sample size of 300 and 150 (the approximate number of interviews achieved for the two types of purchasers, exclusive of the 21 interviews with individuals aged less than 45 years).

One further interview was excluded from the data-set as a result of the respondent refusing to answer certain questions – age among others – essential for the analysis process.

Approximate Sampling Tolerances Applicable to Percentages at or Near These Levels

Base size	10% or 90%	30% or 70%	50%
300 (buy for self)	± 3%	± 5%	± 6%
150 (buy for other person)	± 5%	± 7%	± 8%

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value less than half a per cent but greater than zero. Statistics in charts or tables that are based on small sample sizes (below 40) are flagged on the chart/table.

Stage 4 – Follow up Qualitative Depth Interviews

Following the quantitative survey, 25 depth interviews were carried out with a selection of respondents who agreed that we could re-contact them to take part in follow-up research.

These respondents were selected by SPA Future Thinking and OFT to ensure that we covered a good cross section of consumers including those who:-

- Had both positive and negative experiences of purchasing a mobility aid
- Paid more for a mobility aid than the average price paid by the purchasers of that type of aid in the survey
- Made comments during their first interview indicating they had encountered issues such as disappointment with product purchased or price paid, feeling pressured by salesperson or that information provided was not accurate

The qualitative sample was constructed deliberately to over-represent those encountering issues in order that we could explore their experiences more fully. The profile of depth interviewees is shown below.

Mobility Aid Purchased	For Whom Product Obtained	Gender	Age
Adjustable bed	Self	Female	55-64
Adjustable bed	Self	Female	75-84
Adjustable bed	Someone else	Male	55-64
Bath aids	Self	Male	65-74
Bath aids	Someone else	Female	85+
Scooter	Self	Male	45-54
Scooter	Self	Male	55-64
Scooter	Self	Male	65-74
Scooter	Self	Female	55-64
Scooter	Self	Female	65-74
Scooter	Self	Female	65-74
Scooter	Self	Female	75-84
Scooter	Self	Female	75-84
Scooter	Self	Female	85+
Scooter	Someone else	Male	55-64
Scooter	Someone else	Female	55-64
Specialist seating	Self	Male	55-64
Specialist seating	Self	Male	75-84
Specialist seating	Self	Female	55-64
Specialist seating	Someone else	Female	55-64
Specialist seating	Someone else	Female	65-74
Stair lift	Someone else	Male	65-74
Stair lift	Someone else	Male	75-84
Wheelchair	Self	Female	55-64
Wheelchair	Self	Female	75-84

Detailed Findings

1. Having/Accessing Information to Inform Purchasing Decisions

Previous Experience

> ### *Key Finding:*
>
> Around four in five respondents made their purchase without the benefit of previous experience of buying that type of mobility aid.

Those with previous experience of buying a particular type of product might be expected to start with greater knowledge than those with no prior experience, and this greater knowledge could potentially make it easier for them to make an appropriate purchase decision. Those without prior experience of buying a particular product start from a disadvantage that may result in a more difficult purchase process and/or an unsuitable purchase.

In the mobility aids market, most purchasers had no previous experience of buying the type of product bought on the last occasion.

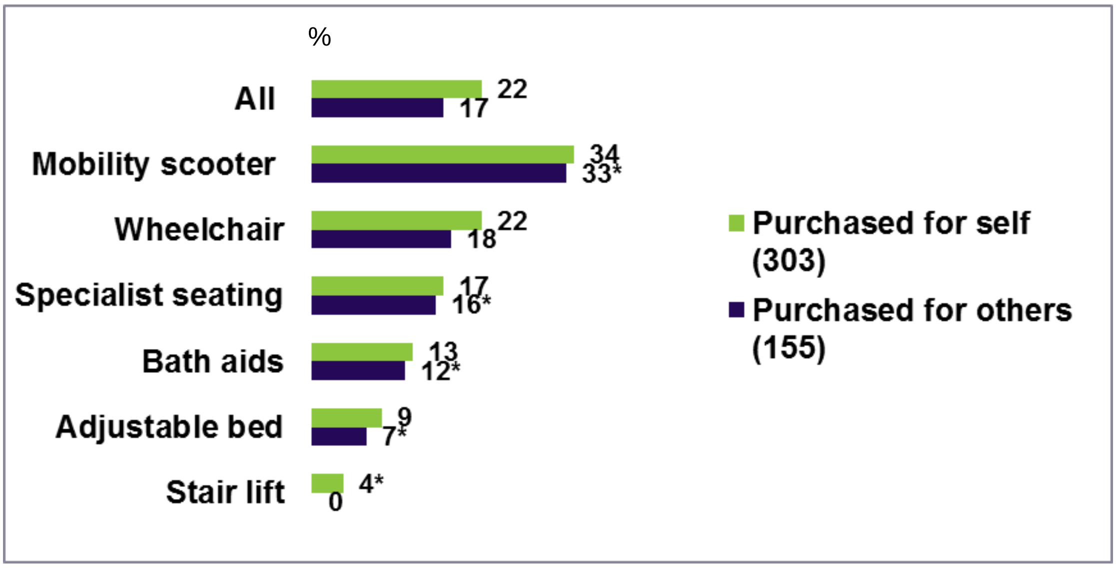
Just under half (47%) of these buying for themselves had previous experience of purchasing any mobility aid and only 22% of those buying for themselves claimed to have previous experience of purchasing the specific type of mobility aid they obtained on this occasion.

Among those who were buying a mobility aid for another person, only 17% had previous experience of purchasing that type of aid and only 44% had previously been involved in purchasing any mobility aid.

Therefore most purchasers were inexperienced in choosing and purchasing mobility aids. This was true regardless of the type of mobility aid purchased. Nevertheless there were differences as Chart 1 overleaf shows.

About one in three mobility scooter purchasers had previous experience of buying that type of product but those obtaining stair lifts were almost all purchasing for the first time.

Chart 1: Proportions of Purchasers of a Mobility Aid Having Bought That Type of Product Before



* Caution: Base size below 40

Accessing Pre-sale Information

Key Finding

Most purchasers accessed pre-sale information and a wide range of sources was cited.

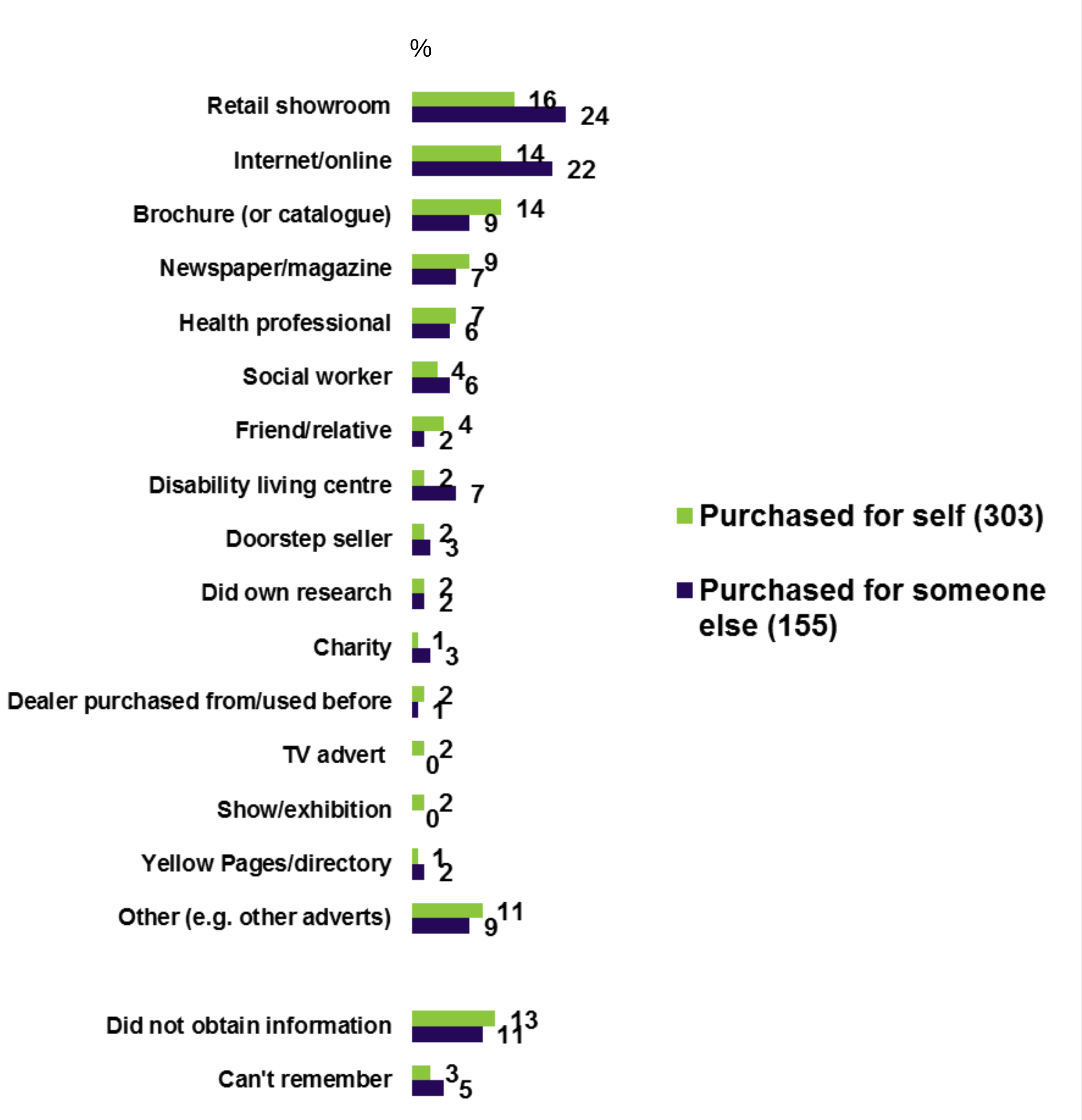
At an early stage in the interview purchasers were asked from where, if anywhere, they obtained information to help them make their purchase decision.

Survey respondents obtaining information cited a wide range of sources the most frequently mentioned being:-

- Retail showrooms
- Internet sites
- Brochures

Chart 2: Obtaining Information

Q. From where, if anywhere, did you obtain information in order to help you make the decision to purchase? (Unprompted Responses)



Around a sixth of purchasers said they either did not obtain any information or could not, at this stage of the interview, remember obtaining any information prior to buying the product.

However, when prompted with information sources, such as the internet, some of them later recalled using such sources.

Given that some purchased their mobility aid up to three years ago it is unsurprising that some respondents had difficulty remembering.

When purchasers were probed on why they had obtained no or little pre-purchase information within the depth interviews knowing where to access information was raised as an issue.

"I wouldn't know where to get it. There's not a lot of help for disabled people I don't think. If you had information then you could, obviously you'd probably, wait. When you know there's a second hand shop with not a lot in there then it's panic buying because if you don't [buy] then you're not going to get nothing."
(Buying for someone else, Scooter – £350, Mobility Aids shop)

"I've never ever had anything that gave you any information about having osteoarthritis or nothing. I've never found anybody, anything that came, that gave you advice on a lot of things. If you only had one thing like that …about what you might need and what you might find helpful, that sort of thing, and a bit on the way to go about it."
(Buying for self, Scooter, invited doorstep seller, £3,000 after discounts)

Later in the quantitative interview, when people were asked specifically whether they obtained information from the internet or advice from healthcare professionals the numbers saying they had received information increased.

The numbers who consistently denied obtaining or were unable to remember obtaining information were around 7-8% for both groups of purchasers.

While this question on information sources was useful in indicating the main sources of information recalled by purchasers, a harder measure of the extent of information sought by purchasers was provided by more specific questions, in particular those related to:-

- Having internet access and obtaining information online
- Obtaining advice from healthcare professionals
- Investigating/comparing alternative suppliers and products

Using the Internet

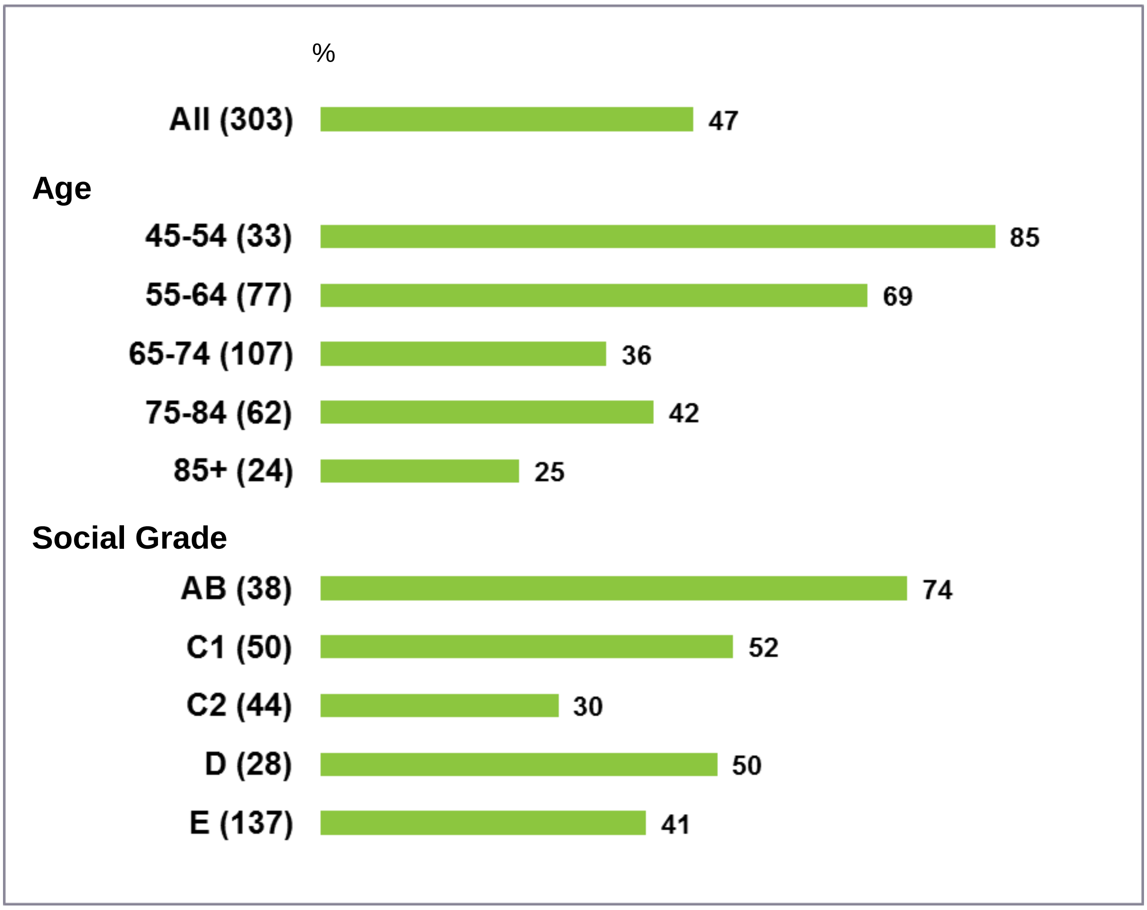
Key Finding:

Reflecting the ages of those buying mobility aids for themselves, only 29% report accessing to the internet to search for information on mobility aids generally**,** while just 14% report the internet as a source of information specifically used to help with their most recent mobility aid purchase.

Fewer than half (47%) of those purchasing for themselves had internet access. In common with the general population, internet access correlated strongly with age, with 85% of 45-54 year olds but only 25% of those aged 85 or over having internet access. There was also a strong correlation with social grade, 74% of ABs (those whose chief wage earner is in professional/senior management occupations) but only 40% of C2DEs (manual workers or dependent on state support) having internet access.

Therefore, as is true in the general population, potentially more vulnerable adults (poorer and older) are less likely to be able to explore different options online.

Chart 3: Proportions of Purchasers for Self with Internet Access



Reflecting their younger age profile and higher social grades, a greater proportion (79%) of those purchasing mobility aids for others had internet access.

Over half (55%) of those purchasing mobility aids for others said they had accessed the internet to search for information on mobility aids, compared with only 29% of those buying for themselves.

These proportions are much higher than those that had mentioned the internet spontaneously as a source of information specific to helping with their most recent mobility aid purchase.

Those using the internet generally visited manufacturers' and/or retailers' websites. Most of those seeking information online compared different suppliers and different brands/models highlighting how the internet helps shoppers become better informed and able to weigh up alternative options.

It is concerning, therefore, that such modest proportions of purchasers are able to access the internet and that many of those with internet access failed to benefit from using it on this occasion.

Expert Advice

Key Finding:

Just under one in three purchasers received advice from a healthcare professional as to the suitability of a mobility aid

With most purchasers not having bought that type of aid before, the importance of receiving appropriate expert advice becomes potentially greater.

However, fewer than three in ten (29%) of those purchasing a mobility aid for themselves said that before making the purchase, they received advice or an assessment from a healthcare professional as to the suitability of a mobility aid for their physical needs. This proportion was below 50% for all types of mobility aid purchased, and in the case of mobility scooters, only 13% of purchasers had received advice or an assessment from a healthcare professional.

A similar pattern was found among those purchasing mobility aids for others. Only 34% said the person they were purchasing for received advice or an assessment from a healthcare professional and this figure was only 16% for mobility scooter purchasers.

Those who were first-time buyers of the particular type of mobility aid were a little more likely than previous purchasers to have obtained expert advice.

Among those buying for others, 30% of first-time and 35% of previous purchasers obtained advice. Equivalent figures for those purchasing for themselves were 30% and 23%.

Those most likely to obtain expert healthcare advice were those who had purchased a mobility aid before, but not the type being purchased on this occasion; but even among this group it was a minority obtaining advice.

Despite that fact that only a minority of purchasers had obtained expert healthcare advice, the overwhelming majority (97% of those buying for themselves and 94% of those buying for others) claimed to be clear about what they needed from the mobility aid.

Comparing Alternative Suppliers/Products

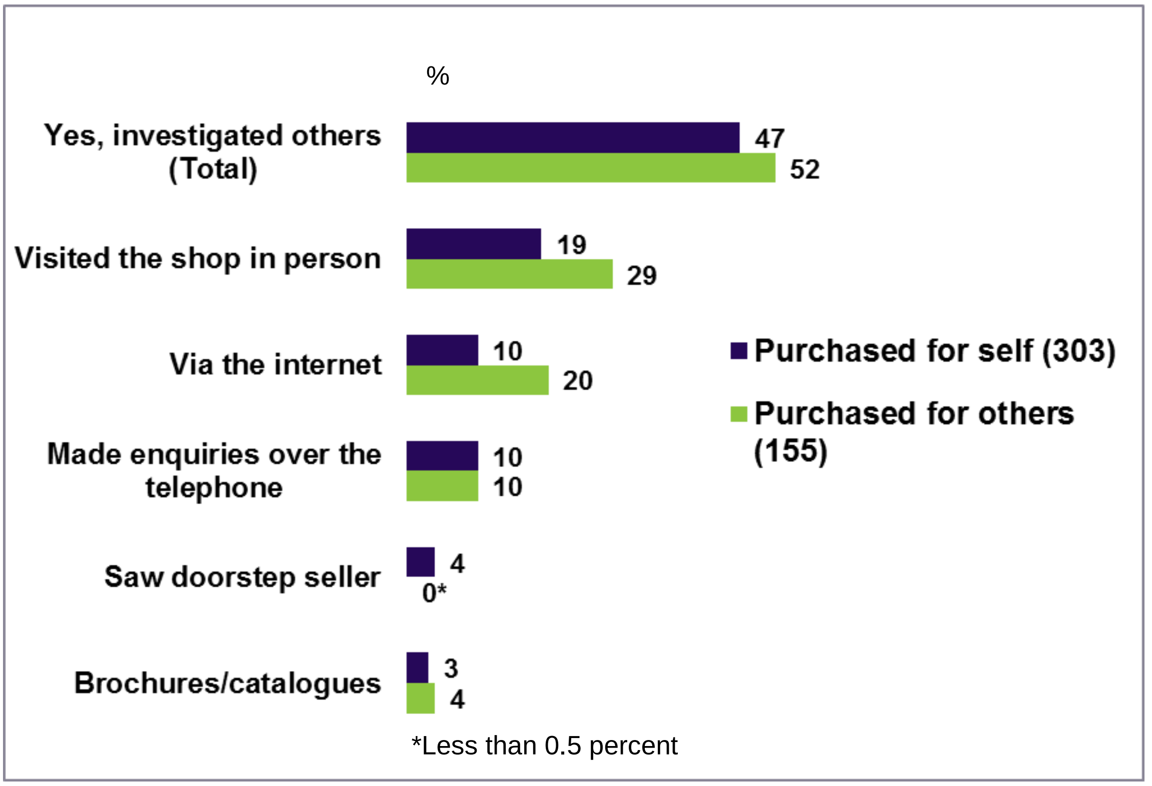
Key Finding:

Among those buying for themselves, 37% had not investigated either alternative suppliers or alternative products

Less than half (47%) of those buying a mobility aid for themselves and just over half (52%) of those buying for someone else had made enquiries to, or had visited or had checked out other possible suppliers.

People buying on behalf of others were more likely to be mobile and to have internet access than those buying on behalf of themselves. Therefore they were more likely to have visited other stores and to have checked out other possible suppliers online.

Chart 4: Whether/How Investigated Other Possible Suppliers – Main Answers



For those who made their purchase at a shop the most common means of investigating other suppliers was to visit other retailers.

But even so, only a minority of those buying from a shop had visited other retail outlets before making their purchase. The fact that the majority of in-store purchasers (almost three in four of those buying for themselves) were doing so without the benefit of having visited other retailers reduces the competitive pressures on retailers to provide good service and a wide range of products at competitive prices.

Those buying from someone who visited their home mentioned a number of possible sources of alternative suppliers including telephone enquiries and store visits. However, the majority of those buying from someone visiting their home did not investigate or make enquiries of other suppliers.

Those buying over the internet were more likely than other purchasers to have investigated other suppliers, among those buying for themselves 77% doing so and among those buying for others 70% doing so, and they were most likely to have done so using the internet.

Those favouring a particular supplier or purchase source cited a wide range of advantages of using this particular provider, the most widely mentioned being 'easy to deal with'. Qualitative research confirmed that for purchasers who were possibly anxious or embarrassed about needing to buy a mobility aid, being able to deal with a reassuring, knowledgeable and sensitive salesperson was potentially very important.

Some shop staff displayed knowledge, expertise and helpfulness and won the trust of customers as these two happy depth interviewees testified:

"He gave us several pamphlets about travelling on the train, one where you could take it, but only on certain buses because of the size of it. Then there was another one on places to go that would accept it, there was a list of hotels in a limited area of where you could go with your mobility scooter, and the signs to look for on signposts".
(Female, bought for self, scooter, mobility aid shop)

"There are cowboys out there and they need stamping on……I know there is advice I will get from my Mendip shop. He will say 'I don't think that one's quite right for you', but I know him and it's not going to be based on price. He is not out to make a bigger sale which is lovely. That's what I would say to anybody who's looking to buy something; find somebody you can trust and then speak to other people who are using similar equipment to what you are considering buying".
(Female, bought for self, scooter, mobility aid shop)

For those buying a mobility aid for themselves, and buying over the telephone or through someone visiting their home, not having to leave their home was seen as a powerful benefit of these methods of purchasing.

Only 12% of those buying for themselves but 18% of those buying for someone else could think of any disadvantages of purchasing through their chosen channel.

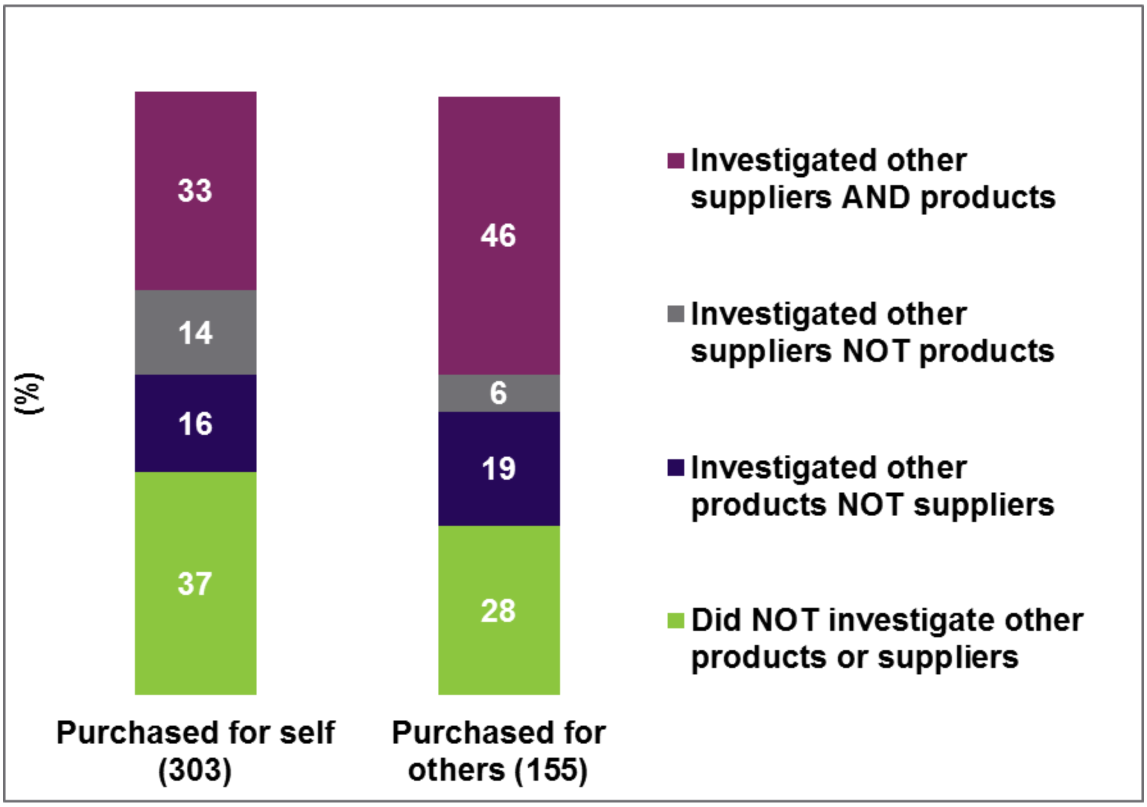
Disadvantages mentioned (all at a low level) included:-

- Not being able to test or see that product in person (this comment being mainly associated with internet purchasers)
- Expensive prices/difficult to compare prices (mentioned by 3-4% of purchasers)
- Limited choice/did not really have what purchaser wanted (2%)
- Long way from home (1-2%)
- Product might be faulty (1%)

Those who made enquires of different suppliers were more likely to have also compared more than one brand or model of mobility aid before purchasing.

So of those buying for others, 89% of those who investigated alternative suppliers checked other products compared to only 41% among those who investigated a single supplier. Equivalent figures for those buying for themselves were 70% and 31%. Sizeable proportions of purchasers (28% of those buying for others and 37% of those buying for themselves) failed to compare suppliers OR products.

Chart 5: Investigating Other Suppliers/Products

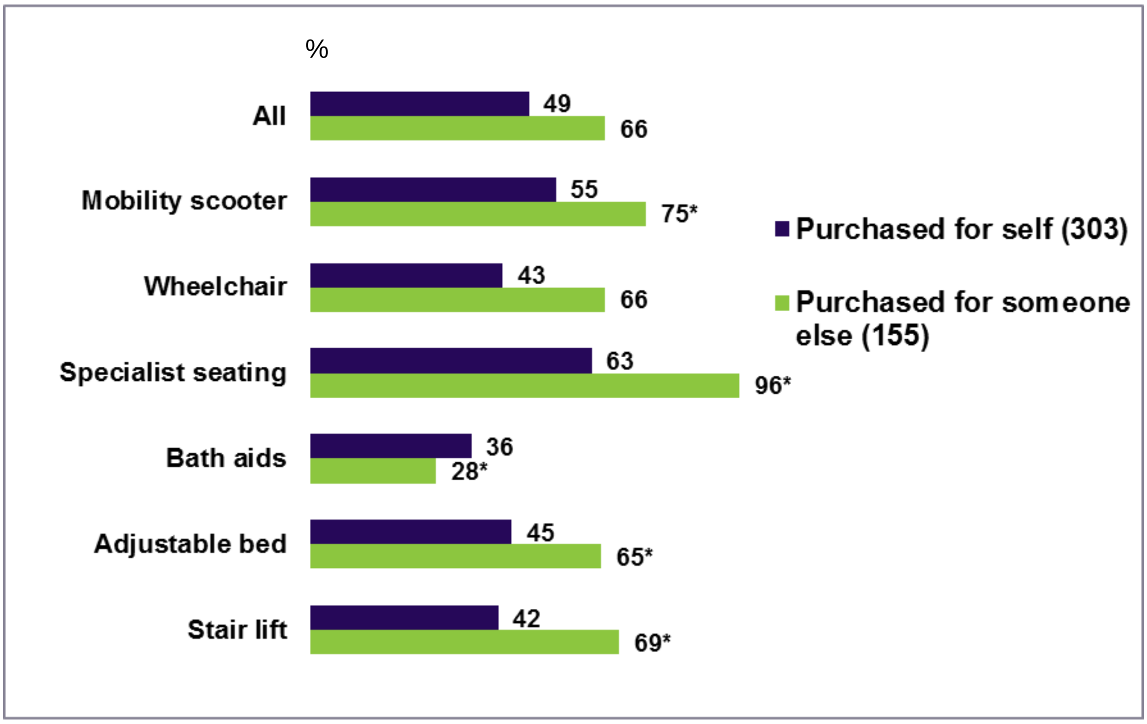


The least common eventuality was for someone to consider only one product but then to make enquiries of more than one supplier of that product.

Most of those buying specialist seating or mobility scooters but only around a third of those buying bath aids investigated alternative products.

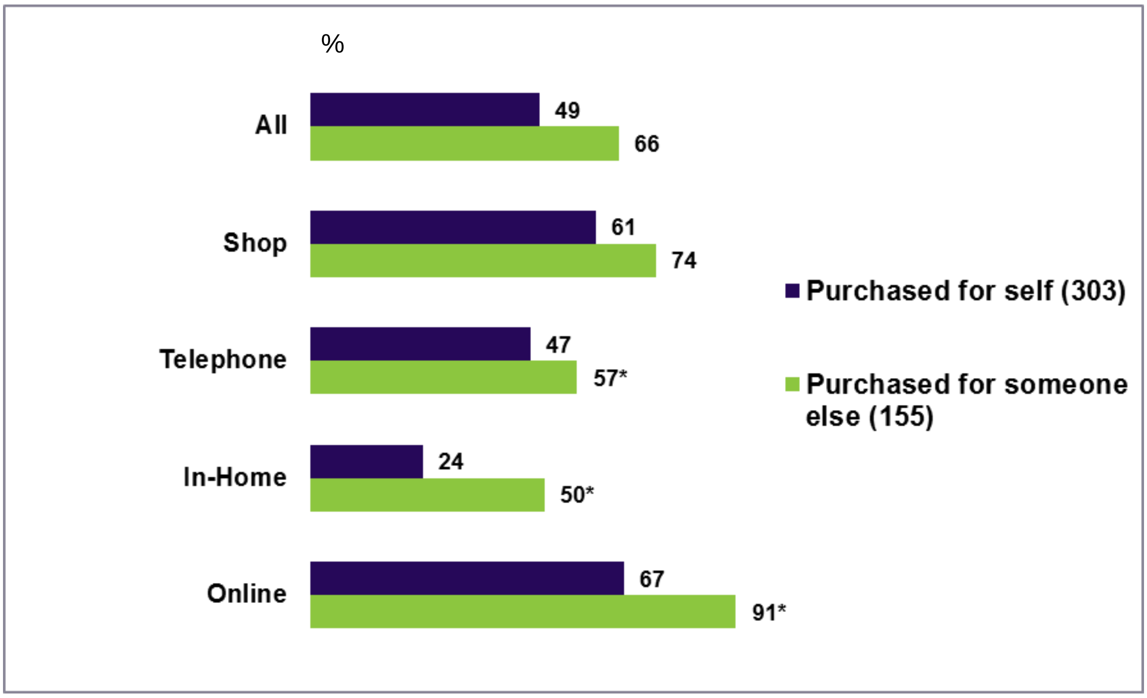
Those buying online or in-store were much more likely to compare products than those buying in-home.

Chart 6: Proportions checking brands/models other than the one purchased – by aid type



*Caution: Sample size below 40

Chart 7: Proportions checking brands/models other than the one purchased – by channel bought from



*Caution: Sample size below 40

How Well Informed are Purchasers?

Key Findings:

Substantial numbers appear to be making purchases from a poorly informed standpoint as around one in five of all those making purchases did so:-

- Without having purchased that type of aid before AND
- Without expert healthcare advice AND
- Without having investigated an alternative supplier or an alternative product

We have seen that although most purchasers mentioned sources of information that aided their purchase decision:-

- Most purchasers were first-time buyers of the mobility aid in question
- Most bought without the aid of expert medical advice
- Many bought without having investigated alternative suppliers or products

These three findings are all of potential concern but there might be less cause for concern if each individual benefited from previous experience or medical advice or shopping around. So for example, individuals who had bought before or received expert advice may have found less need to look at a variety of different products, while those without experience or expert advice might have made a point of comparing products and/or suppliers.

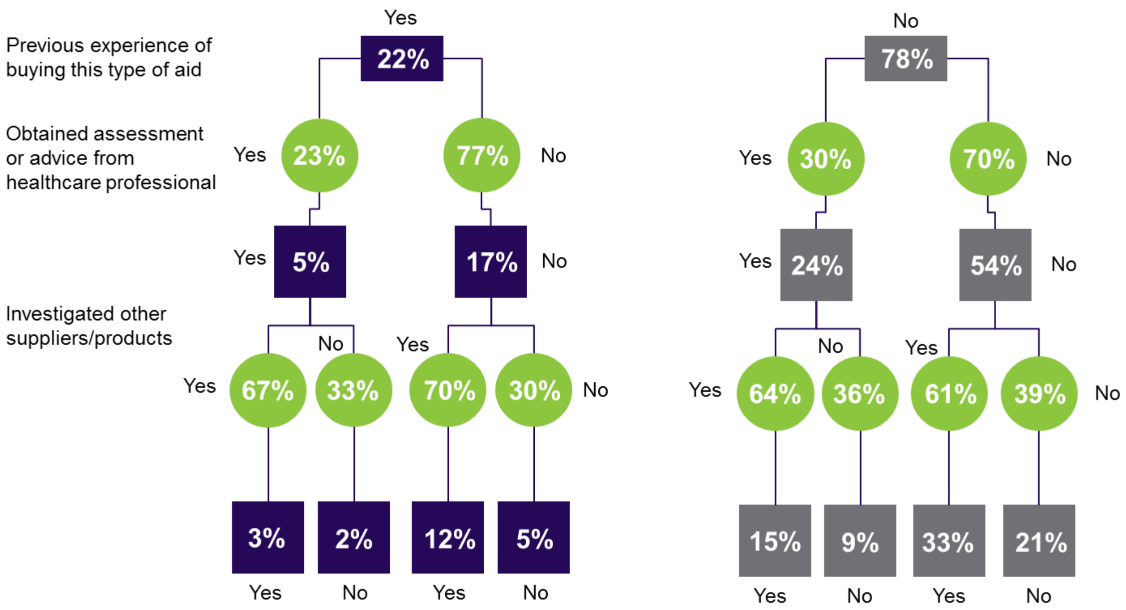
In this section of the report we consider the relationship between those factors, all of which could help guide an individual's purchasing decision.

In general we did not find a strong positive or negative correlation between people having previous experience, receiving advice from a healthcare professional or investigating other suppliers or products.

The chart below shows how those buying for themselves divide according to whether:-

- They have previous experience buying this type of aid
- They obtained an assessment or advice from a healthcare professional
- They investigated other products and/or suppliers

Chart 8: How Well Informed are People Buying for Themselves?



Note: The figures in the purple and grey boxes refer to the proportion of the total sample who have these characteristics e.g. 3% had experience, obtained advice and checked out other suppliers/products. Purple boxes relate to people with previous experience of buying this type of aid, grey boxes to people without experience.

The figures in green ovals relate to the figures directly above e.g. 23% of those with previous experience obtained advice from a healthcare professional.

Most people had no previous experience of buying this type of aid and those purchasers were a little more likely than others to have obtained advice from a healthcare professional.

Nevertheless over half (54%) of those buying for themselves did so without the benefit of previous experience or of advice from a healthcare professional. And these individuals were less likely than others to investigate other suppliers/products, 39% considering one supplier and one product only.

This meant that 21% of all those purchasing for themselves:-

- Had no previous experience of buying this type of aid AND
- Had not received advice from a healthcare professional AND
- Only looked at one product AND one possible supplier.

Substantial numbers therefore appeared to be making purchases from a poorly informed standpoint.

A greater number of those interviewed (33%) had no previous experience or healthcare advice but did compare suppliers and/or products.

However, only 3% of purchasers made their decisions having benefitted from:-

- Previous experience of buying this type of aid AND
- Advice from a healthcare professional AND
- Their own investigations covering more than one supplier and/or more than one product.

Those with previous experience appeared to be a little more likely to investigate other suppliers/products than those with no experience but differences were not statistically significant.

Those obtaining advice from a healthcare professional were no more or less likely than others to explore other suppliers/products.

First-time buyers for themselves who bought without healthcare advice or checking other products/suppliers were not limited to any one sales channel, the largest single group being people who visited a retailer.

Compared to the total sample, a disproportionate number of those buying without advice and without previous experience and without comparing other products or suppliers, made their purchase either in-home or over the phone. This provides further evidence that those buying in-home or over the phone (rather than online or from a retailer) appear to be most at risk from making a poorly-informed decision.

There was NOT a consistent pattern of first-time buyers purchasing without expert advice or comparing products/suppliers appearing to pay more or less than other purchasers, although a higher proportion than in the total sample paid £3,000 or more.

More than four in five were aged 65+ and around four in five were from social classes C2, D and E. These social classes tend to be less affluent and educated than others). More than four in five of these purchasers were women.

So to an even greater extent than the sample as a whole, those purchasing for themselves on the basis of very limited information were skewed towards:-

- Women aged 65+
- From C2DE social classes.

Consumers with this demographic profile could be regarded as potentially vulnerable, and possibly less well equipped to make appropriate and informed decisions.

Among those purchasing for another person, the pattern of responses was very similar, again with 54% buying without themselves having previous experience of buying that type of aid or (the end user) having received advice from a healthcare professional.

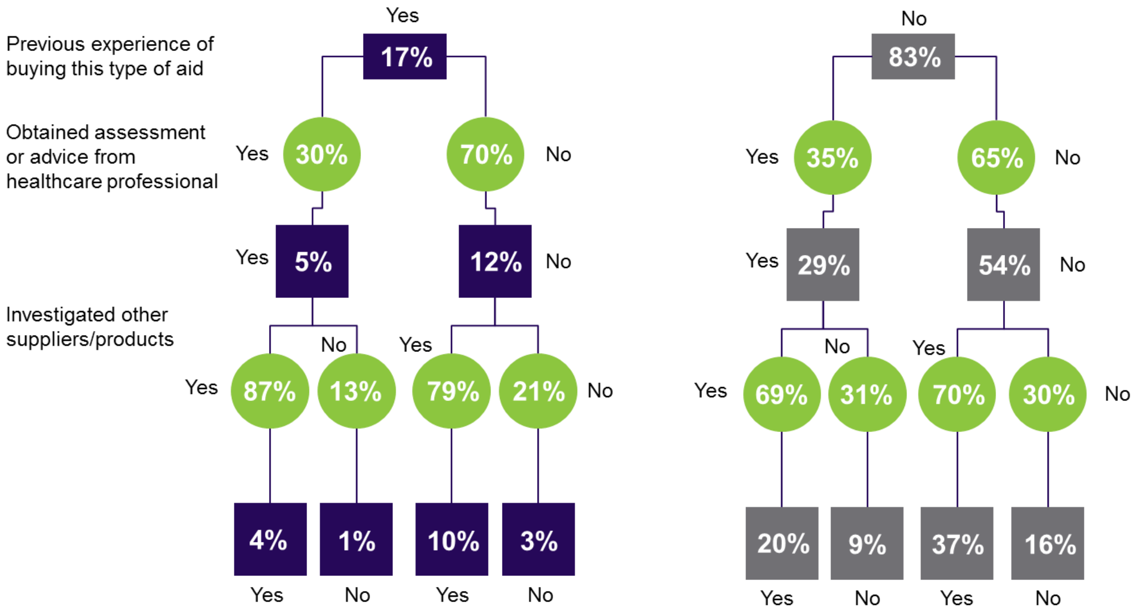
Those purchasing for others (especially those with previous experience of buying this type of aid) were a little more likely to have investigated other suppliers and/or products.

Nevertheless, 16% of all those buying for others did so:-

- Without having themselves purchased that type of aid AND
- Without expert healthcare advice AND
- Without having checked out an alternative supplier or an alternative product

So, even where third parties are involved in the purchase, many end users may end up with a product purchased on the basis of what appears to be very limited knowledge or experience.

Chart 9: How Well-informed are Purchasers Buying for Others?



Note: The figures in the purple and grey boxes refer to the proportions of the total sample who have these characteristics e.g. 4% had experience, obtained advice and investigated other suppliers/products.

The figures in the green ovals refer to the proportions of people in the rectangle or square above who took that action e.g. 30% of experienced buyers obtained advice.

2. Are Consumers Able to Assess and Act Upon Information to Inform Purchasing Decisions?

Perceived Suitability of Purchase Decision

Key Finding

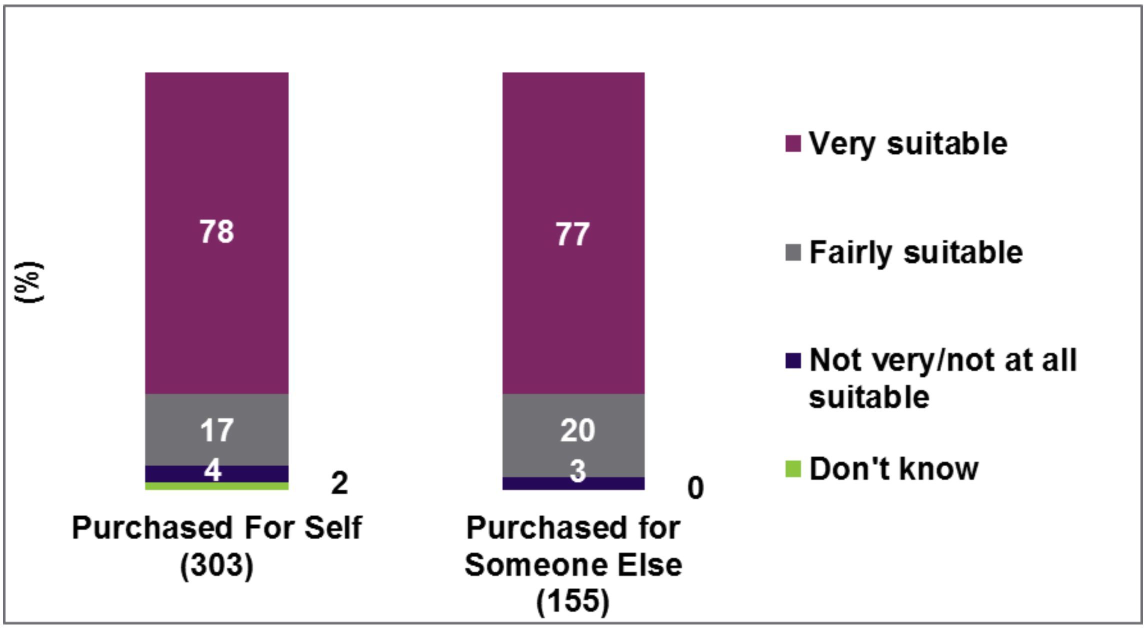
Most purchasers, some operating on the basis of apparently very limited information, felt the product they had purchased was suitable for their needs and they were satisfied with value for money.

In the first sub-section of this part of the report we consider respondents' own perceptions of the suitability of the product they purchased before we consider:-

- The extent to which they felt they had a wide choice of products and suppliers
- Whether they tested the product before purchase
- The range of factors they took into account in informing their purchase decision
- Whether they felt they had been given adequate and appropriate information to aid their purchase decision

The vast majority of purchasers considered the product they purchased to be suitable for their needs.

Chart 10: Perceived Suitability of Mobility Aid Purchased



At first sight this is encouraging but we make two qualifications.

Firstly, while 77-78% described their purchase as 'very suitable' more than one fifth of purchasers described it as 'fairly suitable', or worse. This suggests that around a fifth of purchasers felt, with the benefit of hindsight, that another product might have met their needs better than the one they purchased.

Secondly, in depth interviews, some participants said they had made inappropriate mobility aid purchases in the past and quickly replaced a product they found to be unsuitable.

"I was in agony for nearly all of January, February and through to March with all these different chairs, but I am really pleased with the one I've got now because it's actually exactly what I wanted and the right size".
(Female, bought for self, specialised seating)

The quantitative interview focussed on the last product purchased. It is arguably more likely that the last product was considered to be suitable as the purchaser might be unlikely to hang on for a long time to a product deemed unsuitable.

Very few people felt, with the benefit of hindsight, that they should have purchased a more basic or advanced model than the one they bought. Only 1% of those buying for themselves or someone else thought they should have bought a more basic model while 3% thought they should have bought a more advanced model.

In addition to regarding the product they purchased as suitable for their needs the vast majority (well over nine in ten purchasers) were satisfied with product quality, and eight in ten or more were satisfied with the purchase price of their mobility aid and the overall cost of the mobility aid, including repairs and servicing.

Therefore, interviewed after the mobility aid had been used for up to three years, the vast majority of purchasers for themselves or for others were satisfied with the product purchased and by implication, felt they had made an appropriate purchasing decision.

The fact that many purchasers are satisfied does not mean that competition is operating effectively.

While a few depth interviewees were unhappy at paying more than they should have done for their mobility aid there were others who were indifferent when it was pointed out they had paid much more for their aid than most other purchasers of that type of aid. Their view was that the mobility aid had been affordable and that it had greatly enhanced their life; they were unconcerned when it was suggested they should have paid less.

Some depth interviewees admitted to pressing ahead with a purchase despite being surprised at cost.

"I didn't compare prices, probably basically laziness. They gave me a quote and I thought 'that's a lot of money' but just wasn't really bothered. It looked suitable and I think they're all much of a muchness pricewise and everything".
(Male, bought for self, stair lift, paid £4,500, bought by telephone)

Where purchasers show so little sensitivity to price there is less incentive for the supplier to ensure their products are priced competitively, and there is no guarantee that a supplier who charges above the market average will lose sales.

Perceptions of Choice

Key Finding

Many purchasers felt they had limited choice of suppliers and/or products and most considered only those products which were in a similar price range to that purchased.

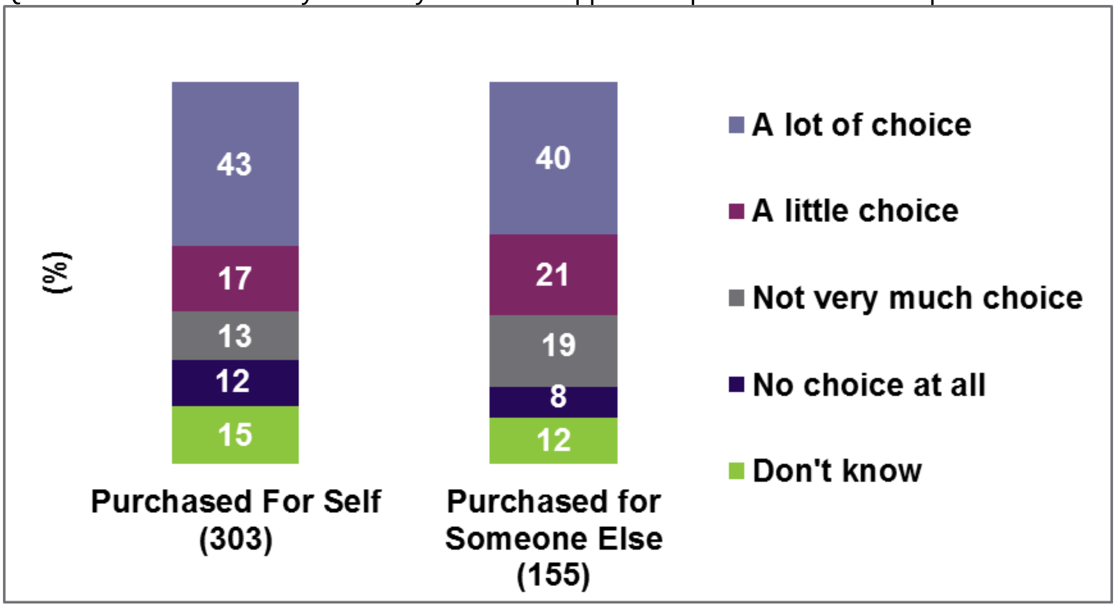
While most purchasers appeared to be satisfied with their purchase decision other survey findings suggest decisions were often made on limited, possibly inadequate information, and in these circumstances it could be difficult for people to make appropriate decisions. There was quite a wide variation in the prices paid by individuals and as a broad generalisation those buying in a store, where they should be able to see a variety of products on display, tended to pay less on average than those purchasing through other channels.

A purchaser's chances of buying a product that is suitable for his/her needs at a reasonable price are likely to be enhanced when there is a wide choice of products and suppliers.

Only around four in ten purchasers of mobility aids considered they had a lot of choice of suppliers to purchase a suitable product from. Around one in ten considered there to be no choice *of supplier* at all.

Chart 11: Views of Choice of Supplier

Q. How much choice do you think you had of suppliers to purchase a suitable product from?



This case study shows how, if potential purchasers visit more than one shop, they may find a better purchase experience at shops other than the first one visited. It also highlights good service a retailer can provide.

Example of Positive Experience

Jean* wanted a scooter for herself but had not bought one before.

Pre-sale information/research

- Looked at some mobility brochures to plan what would be most suitable for her and prices of scooters
- Shops she was aware of did not have anything which met her needs
- She telephoned a mobility helpline she found in a Motability Lifestyle pamphlet and they sent a list of mobility shops in her area
- Visited one shop where the attitude of staff was disappointing so she left before finding a shop where she felt comfortable and well looked after and informed

Information provided by salesperson

- Extensive choice of different brands and models, first and second hand
- Tried around six different scooters to find the most suitable
- Test drove final purchase multiple times outside the shop
- Daughter was shown several times how to dismantle the scooter and fit in car
- Advice given on taking the scooter on public transport
- Prices were provided for all the models tested
- Prices were what they expected to pay having looked at brochures before visiting
- Gave information about refunds and repairs process

"Everything was there for us. All the information we can possibly want, and some that we never even thought about. He answered questions that we hadn't even thought of the questions"

**Not consumer's real name*

Most purchasers (72% of those buying for themselves and 61% of those buying for someone else) only considered products at a similar price/value to the one they eventually bought so they were probably looking at a narrow range of products rather than a broad range encompassing items cheaper or more expensive than the aid purchased.

Just over half those who bought mobility aids for themselves (53%) said they had a lot of choice of *product* but sizeable numbers felt:-

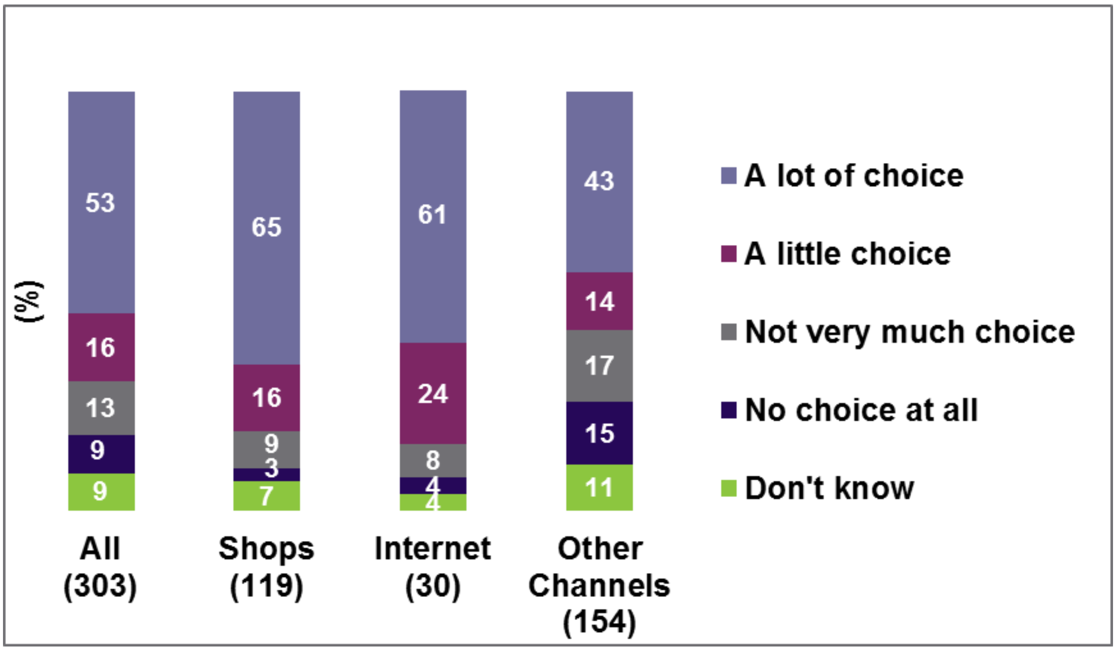
- Their choice was limited (29%)
- They had no choice at all (9%)
- Or were unsure how much choice they had (9%)

Choice appeared to be most limited for bath aid buyers, only 35% of whom said there was a lot of choice.

Those buying in a shop or online were more likely to feel they had a good choice than those purchasing in-home, over the phone or ordering by post.

Chart 12: Views of Choice of Products to Meet their Need: Buy for Self Analysed by Channel Bought From

Q. Overall how much choice do you think you had of products that might meet your needs?



Those buying a mobility aid for others were less likely to think they had a lot of choice among suppliers, only 40% taking this view. A similar proportion felt they had a limited choice (a little/not very much choice), 8% said they had no choice and 12% were unsure. Again, those buying at a retailer or online had more positive views of breadth of choice.

For both types of purchasers, those who received advice from a healthcare professional were more likely to say they had no choice at all, 17% of those buying for themselves and 11% of those buying for others saying they had no choice at all of suppliers, and 15% of those buying for themselves saying they had no choice at all of products. This suggests some healthcare professionals were fairly specific in their product advice.

Sometimes the belief that there was a limited choice of retailers and products was a reflection of the lack of knowledge and ability to source information on the part of the purchasers.

"I wouldn't know where to get it. There's not a lot of help for disabled people I don't think. If you had information then you could wait. When you know there's a second hand shop with not a lot in there it's panic buying because if you don't buy then you're going to get nothing'.

(Female, bought for someone, scooter, mobility aid shop)

But sometimes the perception that only a small number of products were suitable for the customers' needs came about as a result of fairly extensive research.

"I got about three or four (brochures) but what I really wanted them for was to read up on the specs for the chairs, because I thought I was going to get a second-hand one but I wanted to read up on what they could do, how far they would go. I visited different websites like mobility.com, loads of different websites. I read up on different makes and models.

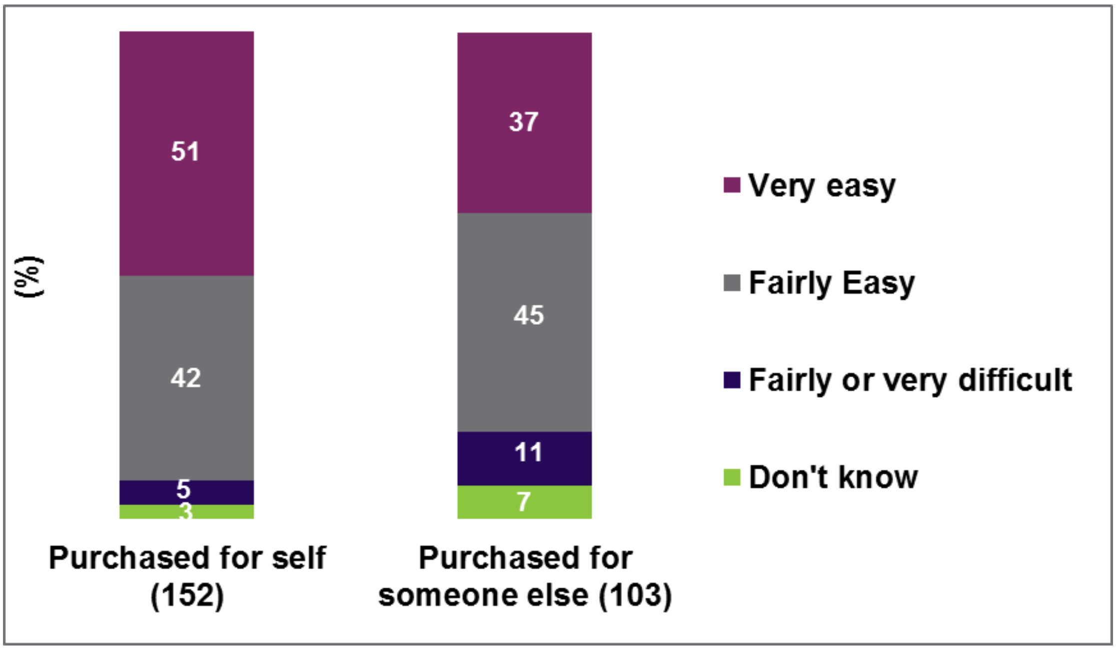
There was quite a good choice of different makes, there was a good choice but when you come down to being over fifteen stone then your choice gets shorter and shorter because you've got to allow for the size of the seating, what weight it takes, how far they will go".

(Female, bought for self, electric wheelchairs, mobility aid shop)

Chart 13 overleaf shows that most said it was easy to compare different brands/models of mobility aid. A few (11% of those buying for someone else and 5% of those buying or themselves) said it was either very or fairly difficult.

Chart 13: Ease of Comparing Products

Q. How easy or difficult was it for you to compare different mobility aid brands or models?
Base: All comparing brands/models



Those buying specialist seating or adjustable beds are more likely to say comparing such mobility aids is difficult than those buying other aids; this was attributed primarily to a lack of choice. There were also isolated comments that a wide price range made comparisons difficult.

Comments that it was difficult to compare specialist seating or adjustable beds were made by only half a dozen respondents each but this apparent pattern is consistent with other OFT research.

Those who went online appeared to have more success in comparing products;

"I just went for one that looks a bit better. There were some very expensive ones that I didn't even consider but I'm quite happy with what I have got. I just put 'adjustable beds' into the search engine and you get a choice and I went through all the different ones having a look and comparing prices."
(Female, bought for self, adjustable bed, internet purchase)

Testing Products

Key Finding

Substantial numbers of those buying bath aids, stair lifts and adjustable beds did so without testing the product they purchased.

Most people did at least test the products they purchased, with 72% of those buying for themselves and 71% of those buying for others doing so. For mobility scooters, around nine in ten tested the product they purchased. But for those buying bath aids, stair lifts or adjustable beds the numbers testing were around or barely above 50%.

Some of those who did not test the product said they did not need or wish to test the product. But the most common reason (especially in the case of stair lifts) was that they were unable to test the product.

Around three in four of those who tested a product said it made it easier to choose a product.

With testers saying that testing made it easier to choose a product, it is concerning that so many purchasers failed to test their mobility aid before purchase. This may have increased their risk of buying a product:-

- That was uncomfortable/did not fit
- That did not work as well as hoped/intended
- That was not easy for them to operate

Factors Taken into Account When Considering Purchase

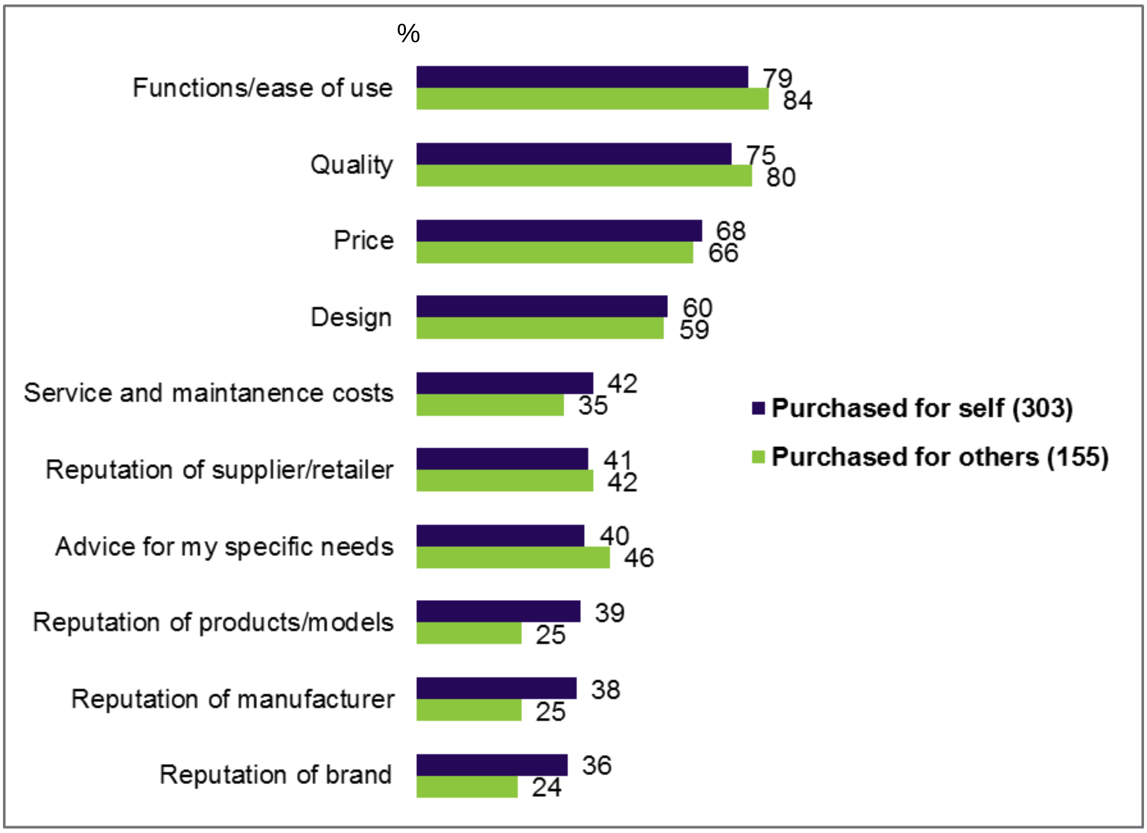
Key Finding

Only two in three purchasers took account of price when buying their mobility aid and relatively few were influenced by the reputation of the supplier, manufacturer or brand.

Purchasers were asked to state which of a number of factors they took into account at the time they purchased their mobility aid.

Chart 14: Factors Taken Into Account When Purchasing

Q. Which of the following factors did you take into account at the time you purchased the mobility aid? (Prompted)



Those who compared different products or models took into account a wider range of factors than those who focused on one product only.

Most purchasers took functionality and quality into account at the time of purchase, but perhaps surprisingly significant numbers did not do so. 21% of those buying for themselves did not take functionality/ease of use into account and 25% did not take account of quality.

Only a minority of purchasers took into account the reputation of product, manufacturer or brand. This suggests that purchasers were starting from a modest level of knowledge compared, for example, with purchasers of electronic goods.

Two in three took account of price – so one in three did not say they had taken price into account at the time of purchase.

This confirms the evidence from some of the depth interviews that price really did not concern some purchasers as they were making a purchase they could afford which could make a major difference to their everyday lives.

Where substantial numbers of purchasers buy without considering price there is less pressure on those selling the products to be price-competitive against other suppliers and against other products.

Completeness/Accuracy of Information Received

Key Finding

Small minorities of purchasers said they had received incomplete or inaccurate information but the vast majority were satisfied with the information they received.

For all the categories of mobility aid covered in this study there were individuals who said that maintenance (servicing or repair) costs was a factor they took into account at the time they purchased the mobility aid. Therefore this appears to be a potential issue for all types of mobility aid.

In the quantitative study, around one in four purchasers (for themselves or others) reported that they were already aware of any costs to maintain the mobility aid they purchased.

This left around three in four who had not been aware. Where potential buyers were not previously aware, in only one in three cases did they report that they became aware of these costs before purchase through the sales channel or salesperson.

This meant that around half the purchasers made their purchase without being aware of likely costs to maintain their mobility aid (although this would include some purchasers who could reasonably expect to incur negligible maintenance costs).

Around three in ten of the purchasers who were aware, or who were made aware, of maintenance costs said this knowledge influenced their choice of product. Therefore some of those unaware of maintenance costs were deprived of information which might have influenced their purchase decision.

However, even after the issue of maintenance costs had been raised in the interview, very few quantitative respondents picked up on this as an issue they wished they had known about at the time of purchase.

When asked whether there was information they did not have when they made their decision which would have been helpful, 8% of those buying for themselves and 7% of those buying for others made suggestions as to what information might have been helpful.

About 2% of all purchasers said they would have found information on the cost of replacement parts/service charges to be helpful while around 1% would have liked to have known more about a maintenance plan.

These modest figures do not suggest many purchasers have been shocked to incur maintenance or repair costs greatly in excess of what they were expecting.

Other spontaneous mentions of the information purchasers would have welcomed were product manual/information mentioned by 2% across all purchasers. There were also a few comments linked to ease of use.

Again the infrequent number of comments suggests few purchasers became aware after using the product that they should have had more information about it at the time of purchase.

The vast majority of purchasers declared themselves satisfied with the product information they had received. Only 2% of those buying for themselves and 5% of those buying for others said they were dissatisfied with the product information before the purchase was made.

However, slightly higher proportions (about 6% of all purchasers) claimed:-

- They were not provided with accurate information on the quality, functions and price of the product
- Some of the information given by the supplier turned out to be inaccurate

Adverse comments about quality and accuracy of information were not unique to any one sales channel. For each sales channel only a minority of purchasers made criticisms. Though numbers of complaints are small, it appears as if those buying through someone visiting their home were more likely than other purchasers to encounter problems with the quality of information. These purchasers were also less likely to have compared other products or suppliers so their need for complete, accurate and unbiased information on the one product they were shown was arguably greater.

Sometimes sales reps failed to mention limitations of the product that purchasers had not thought to question them about beforehand. Inexperienced purchasers were not always able to think of relevant questions.

"I can't take it on the bus, he didn't mention anything like that. It has just that it folded up, it took to pieces which to me sounded brilliant, and I suppose in all honesty because I'd not really thought about it, and not having had one I had never thought about taking it on a bus…

I suppose I never thought it would need repairs. I can't remember that he ever mentioned anything about repairs. I suppose he didn't want to make it too complicated, else I would not be buying it, would I?"
(Female, bought for self, scooter, £3,000, invited doorstep seller)

Nevertheless, overall, the majority of purchasers felt they had received adequate and accurate information on which to base their purchase decision.

3. Consumers' perceptions of the fairness of sales practices

Purchasers' Own Perceptions of Fairness of Treatment

Key Finding

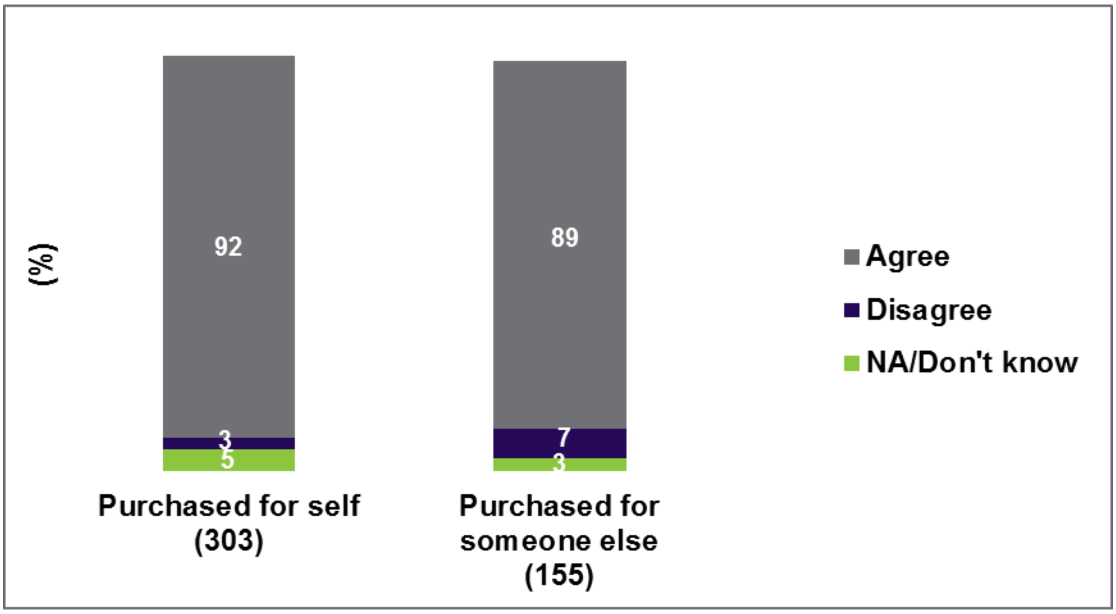
A small minority of purchasers considered the sales process to be unfair and they were often dissatisfied with the purchase price. Those complaining of unfair treatment had often purchased from an in-home/doorstep caller

In considering whether consumers are being treated fairly, purchasers' own perceptions of their treatment must be taken into account, although this measure tells only part of the story.

Around nine in ten agreed that the sales process was fair. Only a small minority of purchasers (3% of those buying for themselves and 7% of those buying for someone else) disagreed that the process was fair.

Chart 15: Whether Agree Sales Process was Fair

Q. Please tell me if you agree or disagree: The sales process was fair?



Those disagreeing that the sales process was fair were not restricted to any one sales channel, but there were more adverse comments about in-house/doorstep sellers than any other channel, despite the fact that only just over 10% bought through this channel.

There was not a strong correlation between time available for purchase and perceptions of fairness; those who felt they needed to make an immediate purchase were no more likely than other purchasers to claim unfairness.

Those saying the sales process was not fair generally regarded the product purchased as suitable for their needs but they were often dissatisfied with the purchase price.

Feeling Pressured

Key Finding

Several purchasers complained of feeling pressured by the supplier or salesperson and this was more likely to occur where people were visited in their own homes

Most purchasers denied feeling pressured, but there were several purchasers (for themselves or others) who felt pressured to purchase the product or a maintenance contract/extended warranty.

Chart 16: Feeling Pressured

Those complaining about pressure did not invariably report being unfairly treated, although a majority of those that reported being unfairly treated also reported feeling pressured.

Pressure was not confined to any one sales channel, but those purchasing through an in-home seller were disproportionately likely to complain of pressure.

Within the in-depth interviews the issue of pressure to purchase was further explored and there were many incidences of people being completely satisfied with the process.

"He didn't unduly press us into buying. He was, this is what I've got, this is how it works, take a look, see what you like and test drive it. He gave us literally all the time in the world."
(Male, buying for self, scooter, £500, mobility aids shop)

Occasionally the perceptions of purchasers regarding the lack of pushiness of a sales rep did not fit well with their actual description of what happened. The gentleman below was very happy with his overall purchasing experience, his post-sales experience and the rep who visited, but that rep made a time-limited offer for the customer to upsell by adding an extra product. Neutral observers might regard that as an extremely pushy approach, especially when the purchaser was elderly.

"I can't remember exactly how we did contact them but he came, there was no pressure, he was just very pleasant, very helpful, showed us everything that was there and what it could do and he said a bonus if you take it now, you can have this spa thing at a price we considered reasonable".
(Male, bought for someone else, bath aids, £2,000, invited doorstep seller)

There was evidence therefore of people experiencing pressure techniques which either did or did not result in a sale. These pressure techniques included repeat phone calls to try and secure a purchase, pushy salespeople in the home and extended visits despite the consumer requesting the salesperson to leave.

"No pressure whatsoever then [when making arrangements for someone to visit] but obviously when he'd been here a while and as the session wore on you could see the pressure was building up, he was determined if he could to get a sale, almost at any cost…We still weren't interested and this hour demonstration took from seven o'clock until about half past ten when we got rid of them."
(Male, buying for self, adjustable bed – no purchase, invited doorstep seller)

"They were saying had I made my mind up and I said yes, I've already told you, I'm not interested. Well, we could do a deal and you could take your mobility allowance and I said I don't want that, I've got so much money and I want to pay for it when I get it. But they just wouldn't listen and I just said listen, if you keep phoning us like this I'm going to go to the Police because you're a nuisance."
(Female, buying for self, electric wheelchair)

"Out of the six I'd say at least four [shops] tried to sell me something that I didn't [need]. They wanted to try and sell me one that went on the road so I needed tax for it."
(Female, buying for self, scooter, £800 not from pressurised sale, mobility aids shop)

"At one stage this online provider came out and did their demonstration and to be honest they're well overpriced compared to some sites...They were a little bit on the pushy side and then when you say 'oh God, they're too expensive' then it's the phone call, "oh yes, we can get so much off'. I think in the end they knocked over £1,000 off but I just didn't like the attitude."
(Female, buying for self, adjustable bed)

"This supplier is a bit pushy but I was in desperate need at the time. I'd already decided I was going to have a stair lift, then I broke my ankle and I've got no downstairs loo or anything. So I was in hospital about ten days, I think, and I decided I'm going to have to get a stair lift straight away and the only one that I contacted that could do it within a week was this particular supplier. They came out and they were a bit pushy, a bit like another supplier/contractor, you know, giving me a cheaper price and quoting, especially when I first said no."
(Male, buying for self, stair lift - £1,000+ from £2,000, phone (manufacturer))

Below is a case study of one purchaser's experiences of purchasing a mobility aid, which includes a number of examples of pressure sales tactics.

Example of Pressure Selling

Jenny* was involved in helping her partner purchase a mobility scooter

"I had a feeling she'd kind of, not exactly been miss-sold before with her earlier scooters, but I did feel there was a lot of pressured selling going on."

- Her partner arranged for an in-home visit from a salesperson from a manufacturer
- The salesperson ended up selling her two scooters in part exchange for over £3,000
- Jenny thought that the salesperson pressured her partner into the sale and that the scooters didn't actually even need replacing

"It was almost like she'd bought it the moment he'd come in, he'd sort of taken that as a starting point, not 'is this the right one, let's check you really need one'… his starting point was she'd already agreed to buy one and it was how much you can sell her, I thought"

"I really felt the guys were high pressurising her and feeding into all the things about not worth repairing and not being a second-hand market"

"He wanted to do it there and then, he'd come from, I don't know, wherever their head office was, [location of head office], so he obviously wanted [to get] a definite order for one but she didn't see that and then he talked her into swapping them both".

"I did just feel the selling was a bit pressurised, it was always men they sent out with them, never women, which upsets the power differences anyway".

**Not consumer's real name*

Although numbers complaining of pressure selling were small, those who bought from an in-home seller were more likely to complain of pressured sales techniques than those purchasing from a shop. Aggregating results across those buying for themselves and those buying for others, almost one in five of those buying in-home had felt a degree of pressure.

It was apparent from depth interviews that if a salesperson was in the home, purchasers found it more difficult to refuse an offer or to ask them to leave after receiving the sales pitch if they did not want to make a decision immediately. In contrast, while people may experience some pressurised selling in a shop it is much easier for someone to end the process and leave the shop.

In reference to purchasing a maintenance contract at the point of sale, 5% of those buying for themselves and 8% of those purchasing for someone else said they were pressured to purchase maintenance a contract or extended warranty by the salesperson/supplier. Among those buying for themselves, there was a higher incidence of being pressured to purchase a maintenance contract for those purchasing adjustable beds or stair lifts. Sample sizes are small but well over 10% of those buying adjustable beds or stair lifts for themselves or for other people complained of being pressured to purchase a maintenance contract or extended warranty.

Consistency/Accuracy of Information and Cancellation Rights

Key Finding

A small minority of purchasers said some of the information given by a salesperson/supplier turned out to be inaccurate. There were many instances of purchasers claiming they had either not been informed about their cancellation rights or that cancellation rights were unclear.

The survey included a number of other questions linked to the consistency of information being provided and whether cancellation rights were made clear and honoured.

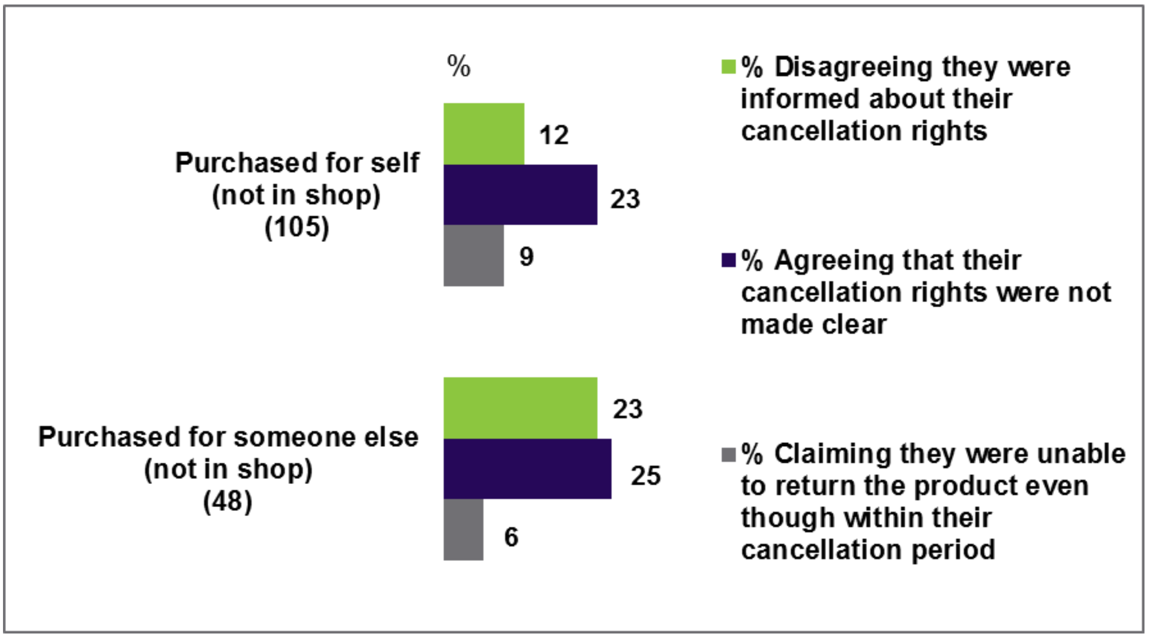
Only a slim majority of purchasers (59% of those buying for themselves and 52% of those buying for someone else) confirmed that they had been provided with a written agreement which reflected what was agreed verbally with the supplier/salesperson. Where the purchase price exceeded £1,000, more than four out of five were provided with a written agreement consistent with what had been agreed verbally. But, possibly due to a lack of formal procedures rather than to any intention to deceive, fewer than half those who paid less than £1,000 were given a written agreement tying in with what they had been told.

A minority of purchasers (7% of those buying for themselves and 5% of those buying for others) agreed that some of the information given by the sales-person/supplier turned out to be inaccurate.

These percentages are not alarmingly high, but it is still of concern that some sales reps or suppliers, whether due to lack of knowledge, training or competence or due to deliberate deception, are providing inaccurate information to potential purchasers.

It is interesting to note that the proportions who said they were not given a written agreement which reflected what was agreed verbally are much higher than the proportion who said they were given information which turned out to be inaccurate. This suggests consumers were failing to insist on a written agreement matching what they had been told, and that they may not have regarded it as important to ensure that the terms of their agreement were recorded in writing.

Chart 17: Proportion Experiencing Issues Regarding Cancellation Rights



Possibly of greater concern is the lack of clarity regarding cancellation rights.

Suppliers selling products online, in-home, by telephone or by post are legally required to inform potential purchasers about their cancellation rights.

Among those buying online, telephone, in-home or by post (i.e. not in-store), 12% of those buying for themselves and 23% of those buying for others denied being informed about their cancellation rights. It is possible a few were told of their rights but had forgotten this by the time of interview, but the high proportion who could not remember being told about their cancellation rights is a concern.

Even where cancellation rights were mentioned they were not necessarily made clear. About one in four purchasers agreed that their cancellation rights had not been made clear.

The comment below, made by a mobility scooter purchaser interviewed in-depth, shows that if people are not told about their cancellation rights they might fail to cancel, even if they developed reservations between the time they agreed to buy and the time the scooter was delivered.

"It wasn't quick [delivery following purchase]. But I hadn't even got enough sense to think, well I could have probably cancelled, that didn't occur to me at all."
(Buying for self, scooter, in-home)

Several respondents complained that they had been unable to return the product they bought even though they were within their cancellation period. These occurrences were found predominantly among those buying over the phone, although there were also instances of postal or online buyers encountering problems.

Most of those saying they had been unable to return the product regarded the product as suitable for their needs, so it is unclear why they tried to return it.

Price Transparency/Clarity

Key Finding

The lack of price transparency suggests consumers may be at risk of paying more than they should when they buy in-home.

In considering this issue a number of factors were examined including:-

- Customers' perceptions of value for money
- Whether particular channels were associated with higher prices
- Lack of transparency of pricing

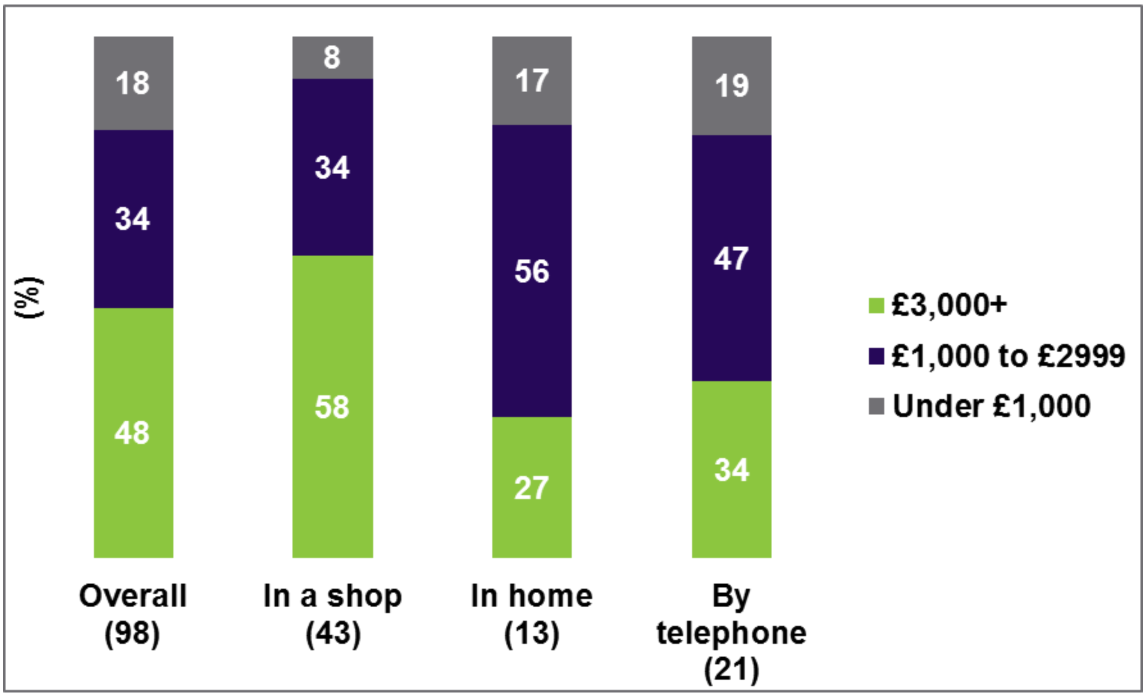
Although the majority of survey respondents claim their purchase was good value for money, issues were uncovered when exploring the experiences of particular consumer sub-groups and through the in-depth interviews.

Those buying for themselves and paying the highest prices (£3,000+) reported some features of their experience that differed from the average experience. For example, a higher proportion of this group said they felt pressured by the salesperson, and to have started the purchase process as a result of an unsolicited telephone call/visit from a salesperson.

For those buying for themselves, there was some evidence of differences in prices being paid through some sales channels compared with others. There are insufficient data to make such comparisons for most types of mobility aid, but for mobility scooters (the most commonly purchased aid), results shown in Chart 18 suggest purchasers paid higher prices when they bought in home or over the telephone compared to in a shop.

It remains possible that some of the disparities reflect differences in choice of quality and features. However, it is also likely that the results reflect the ability of in-home sellers to secure sales at higher prices. As discussed below, the evidence that some retailers will not provide prices except through a home demonstration suggests an awareness that they may be able to sell at higher prices through this channel and a preference to do so.

Chart 18: Prices of mobility scooters bought through different channels: Purchase for self (Excludes refund/don't know)



Overall comparisons of prices between groups need to be approached with some degree of caution since there is potential for any differences to be influenced by the mix of products sold in addition to any effect of average prices.

Moreover, having identified the potential influence of sales channel on average price, comparisons between groups are also subject to the potential for differences to reflect a tendency for some groups to purchase through different sales channels.

Given these complexities, and the rather small sample sizes in many groups, no further in-depth analysis of prices is attempted.

As a broad generalisation, those making a purchase from a retail environment tended to pay less than those who bought as a result of a phone call or a visit to their home, although the cautionary comments made above apply to this result, but there is stronger specific evidence to this effect in relation to those purchasing for themselves and purchasing mobility scooters.

Those who received expert healthcare advice were less likely than other purchasers to take price into account and this may have contributed to them paying a little more on average for their mobility aid. An alternative hypothesis is that those receiving advice from health professionals are more likely to have serious conditions requiring expert advice and specific products.

In-depth interviews with mobility aid purchasers looked into the issue of price in more detail. Concerns were raised on a number of factors associated with cost and these were most commonly in reference to contact with suppliers over the phone or in the home:-

- Suppliers not providing quotes over the phone/online, instead stating that a representative would need to come to the home to provide a cost
- Purchasers are not always shown written prices/brochures by suppliers in the home and discounts are discussed on an ad-hoc basis. The ad-hoc basis of these discounts suggests they will only be offered if sales reps feel they need to do so. If they can persuade an elderly person to buy at the higher price, that person may never be offered a discount. The second issue associated with ad-hoc discounts is the lack of visible price transparency making it hard for consumers to know if they are really getting a good deal)
- Vulnerable people were thought by some respondents to be paying more than they should

"I've been on the web this morning and I was trying to get a price and you can't without leaving your name and your email, your home address, your telephone number."
(Female, buying for self, scooter, £1,590, invited doorstep seller)

"I telephoned two or three [retailers] and in each case I wasn't given any price. I just couldn't get them to quote me...in each case I was offered a free demonstration so I couldn't get any comparison price in any way although I rang three or four, I couldn't compare on price unless I actually had a live demonstration by the salesman."
(Male, Buying for self, Specialist seating, £1,800 from £5,000, phone (manufacturer))

"It needs looking into I think because I don't think they're being treated fairly really. Someone's disabled and they're vulnerable like that and they seem to take advantage of that and I think some of these people, one of the ones we got the scooter from, I don't think he really knew anything about things. He just bought them and sold them. I think maybe they should have to have experience to sell that sort of stuff and not just be anyone off the street just in it to make a profit because if an old person buys something like that, they haven't got the money to go and buy it again if it goes wrong and some of them probably aren't even safe are they?"
(Female, buying for self, Scooter, £350, mobility aids shop)

One respondent was concerned at the prospect of paying over the odds for repairs.

"Afterwards I found out if anything goes wrong with it I have to use one of their dealers. They don't supply parts to anybody. They didn't tell me about that at the time. I said 'you wait, if I get any problems, I'll be at Trading Standards".
(Female, bought for self, stair lift)

There was also one respondent who saw an advert for a discounted adjustable bed only to find that when they actually got in contact, the offer was no longer available.

"You do see adverts on television that these beds are selling for £1,400. It's like a train ride between London and Edinburgh on the East Coast Express £2, when you phone up you discover there's none left. It's the same with the beds. They say there's one for £1,400 but you never get it."
(Male, buying for someone else, adjustable bed, £2,500, invited doorstep seller)

With purchasers of products costing over £3,000 displaying more negative experiences, greater awareness of the average prices of mobility aids is needed. Evidence shows that accurate quotes from suppliers are not always easy to obtain with many claiming a need to visit the home/speak with someone in greater detail before providing prices.

Some in-depth interviewees state that looking back at their experience they realise they may have paid a higher than average price having not seen any written prices or brochures or on speaking with friends/family. While some blame themselves for not thinking to request such verification, there are clearly some suppliers whose policy it is to knowingly not provide this information directly to consumers.

Price Discounts and Reference Pricing

Key Finding

Depth interviews revealed several instances of sales reps, especially those selling in-home, offering apparent discounts without providing evidence of the original price.

Most buying for themselves (70%) paid the price they were originally quoted but a quarter (24%) paid less (this was 17% among those buying for someone else). Most commonly this was because they haggled with the supplier, mentioned by about one in three, or to a lesser extent that the product was discounted or on offer, mentioned by about one in four.

From the in-depth interviews with mobility aid purchasers it also appeared that discounting of what may have been an overinflated original price is a relatively common practice.

The lack of clear and genuine original price makes it difficult for purchasers to know whether they are getting a good deal. A customer might feel they have a bargain because a considerable amount or percentage appears to have been taken off the purchase price; but the product may still be priced uncompetitively.

Previous mystery shopping exercises conducted in the double glazing market for OFT showed that companies which appeared to have discounted their prices the most were often still the most expensive, because the original discount prices bore little relation to the price they would ever attempt to charge. But the consumer might believe they have a good deal on the strength of the apparent reduction.

"Well, the price did seem very movable; it was almost like he was doing calculations in his head."
(Female, buying for someone else, scooter, £3,000 for two scooters – originally £4,000 but part exchanged, invited doorstep seller)

"He started at £3,000... I don't know if that was for one or two beds, I can't remember now... and we said no, we couldn't afford it. So he said £2,500, we said no, couldn't afford that. So they're still trying to get it down and he rung his boss, the usual thing, rung his boss to explain what the problem was then the boss rang back and said you can have it for so and so."
(Female, buying for self, adjustable bed, no purchase, invited doorstep seller)

"I was that gullible, and going along with what he said and it just sounded lovely, and I would get this much off it and that. I thought it would cost me 50p at the finish."
(Female, buying for self, scooter, £3,000 after discounts, invited doorstep seller)

"Well, he said it would be £1,000, I said okay let me have a think about it and this, that and the other. I said is there any discounts or anything on it, he said no, not really. I said "fair enough then, I don't need it" and I walked out the shop. He said "hang on, mate, I can do it for £800"
(Female, buying for self, scooter, £800 from £1,000, mobility aids shop)

"Why not give the price straight off, why give an exaggerated price so as they can knock a big lump off, it's just to give the impression they're knocking so much off for you but, then again, some stupid people might pay their top price."
(Female buying for self, adjustable bed, £1,200 not from pressurised sale, online/phone)

Buying Back

Key Finding

A few depth interviewees raised the issue of being disappointed they had been unable to sell the mobility aid back to the supplier.

In the depth interviews, a few participants said their need for a mobility aid changed overtime. For example, if they moved home and were selling their previous home, they would prefer to remove the stair lift they had purchased.

Elderly people with mobility scooters or other aids may die or become unable to use these aids. In these circumstances it will be helpful if suppliers agreed to take (and ideally buy) back the purchased aid.

A couple of depth interviewees observed that they had been disappointed suppliers were uncooperative regarding taking back or removing a product no longer required or even offering advice as to what the owner should do.

Raising Issues with Other Bodies

Key Finding

This research suggests the level of complaints regarding selling of mobility aids received by Consumer Direct and others greatly understates the number of actual purchasers encountering issues with the sales process.

Mobility aid purchasers who had encountered any of the following issues could have felt motivated to report their experiences to a third party such as Consumer Direct, Trading Standard Office or another body:-

- Cancellation rights were not made clear
- Unable to return product though within cancellation period
- Felt pressured to purchase the product or maintenance contract by salesperson/supplier
- Received an unsolicited telephone call/visit from a salesperson which led to them purchasing the product
- Some of the information given by salesperson/supplier turned out to be inaccurate

In our survey only six individuals who bought for themselves said they had made contact. This is around 7% of those mentioning one or more of the issues above, and just 2% of all those buying for themselves. None of those who purchased for someone else reported issues to a third party. This suggests that for every mobility aid purchaser who has contacted Consumer Direct, OFT or their local trading standards office about problems or poor experiences in relation to purchasing a mobility aid, there are at least a dozen more who chose not to make contact or did not think of doing so.

The level of complaints to OFT is likely therefore to greatly understate the level of consumers encountering problems such as inappropriate sales tactics.

Appendix 1 – Sample Profile

Purchasing for Self (Aged 45+)

	Unweighted		Weighted	
	Number	%	Number	%
Total	**303**	**100**	**303**	**100**
Most recent purchase				
Mobility scooter	106	35	106	35
Specialist seating	51	17	52	17
Wheelchair	46	15	45	15
Bath aids	46	15	46	15
Stair lift	26	9	26	9
Adjustable bed	22	7	22	7
Specialist wheelchair seating	3	1	3	1
Hoist	3	1	3	1
Age				
45-54	33	11	31	10
55-74	184	61	176	58
75+	86	28	96	32
Gender				
Male	87	29	90	30
Female	216	71	213	70
Ethnicity				
White	294	97	295	97
Non-white	4	1	4	1
Refused	5	2	4	1
Social grade				
ABC1	88	29	90	30
C2DE	209	69	208	69
Refused	6	2	6	2
Relationship status				
Single	29	10	27	9
Married/cohabiting	147	49	144	48
Widowed/separated/divorced	125	41	130	43
Refused	2	1	2	1

Location				
Urban	95	31	95	31
Rural	81	27	80	27
Suburban/semi-rural	110	36	112	37
Don't know	17	6	17	6
Tenure				
Owner/occupier	175	58	177	59
Social renter	97	32	95	31
Private renter	13	4	12	4
Other	7	3	7	3
Refused	11	4	11	4

Purchasing for Someone Else (Aged 45+)

	Unweighted		Weighted	
	Number	%	Number	%
Total	**155**	**100**	**155**	**100**
Most recent purchase				
Wheelchair	53	34	50	33
Mobility scooter	34	22	33	21
Specialist seating	19	12	19	12
Bath aids	16	10	16	10
Stair lift	17	11	16	10
Adjustable bed	11	7	14	9
Hoist	3	2	4	2
Specialist wheelchair seating	2	1	4	2
Age				
45-54	29	19	54	35
55-74	86	56	75	48
75+	40	26	26	17
Gender				
Male	70	45	69	44
Female	85	55	86	56
Ethnicity				
White	149	96	149	96
Non-white	2	1	2	1
Refused	4	3	4	3
Social grade				
ABC1	74	48	77	50
C2DE	76	49	73	47
Refused	5	3	6	3
Relationship status				
Single	10	7	13	8
Married/cohabiting	117	76	115	74
Widowed/separated/divorced	27	17	27	18
Refused	1	*	1	*
Location				
Urban	49	32	52	33
Rural	44	28	44	29

Suburban/semi-rural	57	37	54	35
Don’t know	5	3	5	3
Tenure				
Owner/occupier	122	79	123	79
Social renter	18	12	18	12
Private renter	5	3	6	4
Other	1	1	2	1
Refused	9	6	7	5

Appendix 2 – Questionnaire

OFT Mobility Aids: Mainstage Questionnaire

Version 5

J7962/rm/sl/ar

Introduction

Good morning/afternoon. My name is … and I am calling from SPA Future Thinking, an independent research consultancy. We are conducting a survey about Mobility Aids on behalf of the Office of Fair Trading (the OFT). The OFT is a public body whose mission is to make markets work well for consumers.

If you qualify for the survey, the interview should take between 15 and 20 minutes to complete and is intended to help ensure people purchasing mobility aids receive a good service and are treated fairly.

READ OUT IF NECESSARY
The survey will be undertaken under strict market research codes of conduct and is completely confidential. The OFT will not be able to identify you in any way from the report we produce for them.

Yes	1	**Continue**
No	2	**Thank & close**

SECTION 1 – Background

Personal Details

QS1In the <u>last three years</u>, have you purchased, or been closely involved with the decision making process leading to the purchase, of any of the following mobility aids either for yourself or on someone's behalf? (EXPLAIN IF NECESSARY: this may have been using your own funds, or funding provided by the NHS but excludes purchases made by the NHS on your behalf.) READ OUT***.*** MULTICODE OK

1. Wheelchair
2. specialist wheelchair seating
3. Mobility scooter
4. Hoist
5. Bath aids (for example, bath lift, shower cradle, bath seat). NOT low value products such as simple grab rail or bath step.
6. Stair lift
7. Adjustable bed
8. Specialist seating (for example the following chairs for mobility problems: riser recliner chair, chair with tilt-in facility)
9. None of these

QS2 and QS3 REMOVED

ASK QS4 IF CODE 8 AT QS1. OTHERS GO TO FILTER AT Q1

QS4 **Has anyone else in the household purchased, or been closely involved with the decision making process leading to the purchase, of these mobility aids in the last three years?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know

IF CODE 1 'YES' ASK TO SPEAK WITH THEM OR MAKE APPOINTMENT AND REPEAT SCREENING QUESTION QS1. IF CODES 2-3 CLOSE

For the purpose of the survey, during the interview I will refer to 'the purchase' even if you were only involved in the decision making process rather than the actual point of sale.

ASK Q1 IF MORE THAN ONE AID MENTIONED AT QS1. OTHERS GO TO Q2

Q1 **What was the mobility aid you purchased most recently?** SINGLE CODE ONLY. BRING IN CODES AS RELEVANT FROM QS1 OR QS2

1. Wheelchair
2. specialist wheelchair seating
3. Mobility scooter
4. Hoist
5. Bath aids (for example, bath lift, shower cradle, bath seat). NOT low value products such as simple grab rail or bath step.
6. Stair lift
7. Adjustable bed
8. Specialist seating (for example the following chairs for mobility problems: riser recliner chair)
9. None of these

READ OUT TO RESPONDENTS AT Q1 ONLY: **We would like you to respond to the following questions about this most recent purchase.**

ASK ALL

Q2 **Was this purchase for your own use or for someone else?** SINGLE CODE ONLY.

1. Respondent
2. Someone else

IF CODE 1 ASK Q3. OTHERS GO TO Q4

Q3 **Did you receive any help in purchasing or deciding to purchase the** *<bring in code 1-7 from SQ1 OR SQ2 if single code **OR** from Q1 if multicode at SQ1 OR SQ2*>**? If yes, from who?** DO NOT READ OUT.MULTICODE.

Yes:

1. Parent/Guardian
2. Son/Daughter/Son-in-law/Daughter-in-law
3. Other family
4. Friends
5. Health professional
6. Social worker
7. Carer
8. Other professional
9. Charity
10. Other (specify)

11. Don’t know/can’t remember

IF CODE 2 AT Q2 ASK Q4. OTHERS GO TO Q5

Q4 **And who was the person you helped in making the purchase?** DO NOT READ OUT.SINGLE CODE ONLY.

1. Parent(s)
2. Son/Daughter
3. Other family
4. Friend
5. Other person act as carer for
6. Other (specify)
7. Don’t know/can’t remember
8. Refused

ASK ALL

Q5 **Can you tell me, which of the following best describes the reason for you purchasing the***<bring in code 1-7 from SQ1 OR SQ2 if single code **OR** from Q1 if multicode at SQ1 OR SQ2*>**?** READ OUT.MULTICODE OK.

BRING IN I/PERSON CODES DEPENDENT ON RESPONSE AT Q2 (‘Respondent’ = I statements/’Someone else’ = Person statements’)

1. I am/person I helped with process is… frail/elderly
2. I have/person I helped with process has …a long-term physical condition
3. I have/person I helped with process has …a progressive condition such as multiple sclerosis, Parkinson’s, motor neurone etc.
4. I have/person I helped with process has …a general mobility impairment
5. Other (SPECIFY)
6. Refused

ASK IF CODE 1 AT Q2 **AND** CODES 1-10 AT Q3, OR CODE 2 AT Q2

Q6 **And can you tell me why you** *<if code 1 at Q2* **had help>**<if code 2 at Q2 **helped> to purchase the mobility aid?** MULTICODE OK. DO NOT READ OUT FULL LIST BUT PROMPT IF NECESSARY

1. <Mobility aid user is/I am> housebound
2. <Mobility aid user/I> was in hospital
3. <Mobility aid user does/I do> not like to visit retailers/make purchases
4. <Mobility aid user finds/I find> it difficult to visit retailers
5. <Mobility aid user does/I do> not trust/have confidence in dealing with retailers
6. <I make/ Helper makes> all financial decisions for the mobility aid user
7. <I/Helper> always helps to deal with things like this
8. <I/Helper> wanted to make sure it was a fair process
9. <I/Helper> wanted to make sure the most suitable mobility aid was purchased
10. <I/Helper> wanted to make sure other unnecessary products were not also sold
11. Other (SPECIFY)
12. Don't know/Refused

ASK ALL

Q7 **Was this your first experience of purchasing a mobility aid for either yourself or someone else or have you done so before?** SINGLE CODE ONLY.

1. First experience
2. Multiple experiences

Product Details

Q8 **Can you tell me what brand of** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2****> was purchased?***

Q9 **And did the** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2*>**need to be specially made for you/the person you were purchasing for?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

Q10 Can you tell me within which of the following price brackets the *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2***>cost?** READ OUTSINGLE CODE ONLY

1. Under £500
2. £500-£999
3. £1,000-£1,499
4. £1,500-£1,999
5. £2,000-£2,499
6. £2,500-£2,999
7. £3,000-£3,499
8. £3,500-£3,999
9. £4,000-£4,499
10. £4,500-£4,999
11. £5,000+
12. Don't know/can't remember
13. Refused

ASK Q11a IF ANY CODES 1-11 AT Q10. OTHERS GO TO Q12

Q11a Was this final price you paid the same, more or less than the price originally quoted by the supplier? SINGLE CODE ONLY

1. Same
2. More
3. Less
4. Don't know/can't remember
5. Refused

IF 'MORE' ASK Q11b
IF 'LESS' ASK Q11C
OTHERS GO TO Q12

Q11b Why did you end up paying more than the price originally quoted? PROBE FULLY

GO TO Q12

Q11c Why did you end up paying less than the price originally quoted? PROBE FULLY

Sales Channel

ASK ALL

Q12 From where, if anywhere, did you obtain information in order to help you make the decision to purchase? Anywhere else? MULTICODE OK

1. Brochure
2. Internet/online
3. Doorstep seller
4. Retail showroom
5. Disability living centre
6. Health professional
7. Social worker
8. Other professional
9. Charity
10. Other (Specify)
11. Don't know/can't remember

12. Did not obtain any information

ASK Q12a IF CODE 2 AT Q12. OTHERS GO TO Q13

Q12a What type of internet sites did you visit? PROMPT IF NECESSARY.MULTICODE OK

1. Manufacturers
2. Retailers
3. Charities
4. NHS/Health information
5. Mobility aid forums
6. Comparison sites
7. Other (specify)
8. Don't know/can't remember
9. Refused

ASK IF MORE THAN ONE CODED 1-9 AT Q12. OTHERS GO TO Q14.

Q13 Which of these sources of information was the most helpful in informing your purchase? SINGLE CODE ONLY. BRING IN CODES GIVEN AT Q12

1. Brochure
2. Internet/online
3. Doorstep seller
4. Retail showroom
5. Disability living centre
6. Health professional
7. Social worker
8. Other professional
9. Charity
10. Other (Specify)

ASK ALL

Q14 **Which of the following best describes how the**<*bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2*>**was purchased?** READ OUT. SINGLE CODE ONLY

1. Visited a shop in person
2. Visited a manufacturer's premises in person
3. From a doorstep seller
4. Via the internet
5. Over the telephone
6. Ordered by post
7. Other (SPECIFY)
8. Don't know/can't remember

Q14a REMOVED

Q15 **Before you made your purchase, did you make enquiries, visit or check out other possible suppliers? If yes, how?** IF VISITING OTHERS, ASK WHICH. MULTICODE. DO NOT READ OUT

1. Visited a shop in person
2. Visited a manufacturer's premises in person
3. From a doorstep seller
4. Via the internet
5. Over the telephone
6. Ordered by post
7. Other (SPECIFY)
8. No – only used one source

ASK IF CODES 1-8 AT Q14. OTHERS GO TO Q18

Q16 **What, if any, were the benefits of purchasing** *<insert code 1-8 from Q14>***?** DO NOT READ OUT.MULTICODE OK

1. Easy to deal with
2. Good customer service
3. Knowledgeable staff
4. Kind/sensitive staff
5. Quick process
6. Trustworthy
7. Reasonable prices
8. Used them before
9. Referred by someone else
10. Close to home
11. Did not have to leave the home
12. Large range of products
13. Small range of products
14. Had what I wanted
15. Provided information
16. Other (specify)
17. No benefits

ASK IF CODES 1-8 AT Q14. OTHERS GO TO Q18

Q17 **And what, if any, were the disadvantages of purchasing** *<insert code 1-8 from Q14>***?** DO NOT READ OUTMULTICODE OK

1. Difficult to deal with
2. Poor customer service
3. Long process
4. Not trustworthy
5. Expensive prices
6. Not used them before
7. No-one else I knew had used them before
8. Long way from home
9. Restricted by not having much choice
10. Felt pressured to purchase
11. Large range of products
12. Small range of products
13. Did not really have what I wanted
14. Did not provide information
15. Other (SPECIFY)
16. No disadvantages

SECTION 2 – Consumers making informed choice

Pre-purchase

ASK ALL

Q18 **<u>Before</u> making the purchase, did you/the person you were purchasing for receive any advice or assessment from a healthcare professional as to the suitability of a mobility aid for your/their physical needs?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

Q19 **Do you think you were clear about what you needed from the** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2>***?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

ASK IF NO AT Q19. OTHERS GO TO Q22

Q20 **Did you try to receive further information/assistance in order to understand your needs?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

ASK IF YES AT Q20. OTHERS GO TO Q22

Q21 **From where, did you try to receive further information/assistance?** DO NOT READ OUT. MULTICODE

1. Retailer
2. Manufacturer
3. Online/Internet
4. Health professional
5. Social worker
6. Other professional
7. Charity
8. Family/friends
9. Other (Specify)
10. Don't know/can't remember

ASK ALL

Q22 **How easy, or difficult was it for you to obtain information that helped with the purchase?** SINGLE CODE ONLY

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Did not need information
7. Don't know/can't remember

Q23 **Did you compare more than one brand or model of** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2***>before purchasing?** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

ASK Q24 IF YES AT Q23. OTHERS GO TO Q26

Q24 **How easy, or difficult was it for you to compare different mobility aid brands or models?** READ OUT.SINGLE CODE ONLY

1. Very easy
2. Fairly easy
3. Fairly difficult
4. Very difficult
5. Did not need to compare
6. Don't know/can't remember

ASK Q25 IF CODES 3-4AT Q24. OTHERS GO TO Q26

Q25 **Why do you say it was difficult to compare different mobility aid brands or models?** TYPE IN RESPONSE

ASK ALL

Q26 Overall, how much choice do you think you had of products that might meet your needs/ the needs of the person you were purchasing for? READ OUT.SINGLE CODE ONLY

1. A lot of choice
2. A little choice
3. Not very much choice
4. No choice at all
5. Don't know/can't remember

Q27 And how much choice do you think you had of suppliers to purchase a suitable product from? SINGLE CODE ONLY

1. A lot of choice
2. A little choice
3. Not very much choice
4. No choice at all
5. Don't know/can't remember

Q28 Once you decided to purchase/needed to purchase the *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2***> how quickly did the purchase need to be made?** DO NOT READ OUT.SINGLE CODE ONLY

1. Immediately
2. Over a few days
3. 1-2 weeks
4. 3-4 weeks
5. 1-3 months
6. 3+ months
7. Don't know/can't remember

ASK IF CODES 1-6 AT Q28. OTHERS GO TO Q30

Q29 Did this make it …..? READ OUT.SINGLE CODE ONLY

1. Easier to shop around and check out different products
2. More difficult to shop around
3. Or did it not affect you
4. Don't know

Q29a REMOVED

ASK ALL

Q30a Did you test the product? SINGLE CODE ONLY

1.	Yes	GO TO Q30b
2.	No, did not wish to test it	GO TO Q32
3.	No, was not able to test it	GO TO Q32
4.	Not relevant – did not need to test	GO TO Q32

Q30b Did you test it? READ OUT. CODE ALL THAT APPLY

1. In home
2. In store
3. Other (specify)

Q30c Did the fact you tested the product make it easier or more difficult to choose a product?

1. Easier
2. More difficult
3. No difference

GO TO INSTRUCTION BEFORE Q32

Q31a AND Q31b REMOVED

ASK IF CODE 1 AT Q9. OTHERS GO TO Q33

Q32 You mentioned that the *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2*> ***had to be specially made. How, if at all, did this affect your purchasing experience?*** DO NOTREAD OUT. MULTICODE

1. Had to use particular supplier
2. Not available at many suppliers
3. Had to purchase particular brand/model
4. Had to purchase more advanced product
5. Had to purchase more basic product
6. Took longer to receive it
7. Had to make repeat calls/visits
8. Other (SPECIFY)
9. Did not affect experience
10. Don’t know/can’t remember

Point of Sale

ASK ALL

Q33 **Which of the following factors did you take into account at the time you purchased the** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2***>?**
READ OUT. CODE ALL MENTIONS

1. Price
2. Service and maintenance costs
3. Quality
4. Functions/ease of use
5. Design
6. Reputation of manufacturer
7. Reputation of supplier/retailer
8. Reputation of brand
9. Reputation of product/model
10. Advice on my/person purchasing for specific needs
11. Other (SPECIFY)
12. Don't know/can't remember

ASK IF CODES 1-10 AT Q33. OTHERS GO TO Q35

Q34 **And where did you get the information on these factors*?*** DO NOT READ OUT. MULTICODE UP TO 3 MENTIONS

1. Retailer
2. Manufacturer
3. Online/Internet
4. Health professional
5. Social worker
6. Other professional
7. Charity
8. Family/friends
9. Other (Specify)
10. Don't know/can't remember

ASK ALL

Q35a **Did you consider a model with a higher value than the product you finally purchased? (for example one with extra features)**SINGLE CODE ONLY

1. Yes
2. No
3. Can't remember

Q35b **And did you consider a lower value model than the product you finally purchased?**
SINGLE CODE ONLY

1. Yes
2. No
3. Can't remember

Q36 **Were you already aware or made aware of any costs to maintain the** *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2>***you purchased (e.g. repairs and maintenance for the life of the product)*?*** SINGLE CODE ONLY

1. Yes, already aware
2. Yes, made aware
3. No
4. Don't know/can't remember

Q37 REMOVED

ASK Q38 IF YES AT Q36 OTHERS GO TO Q39

Q38 **Did this knowledge make you choose that product over another*?*** SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

ASK ALL

Q39 **Was there any information you did not have when you made the purchase which would have been helpful to you in making your decision*?*** SINGLE CODE ONLY

1. Yes (SPECIFY)
2. No
3. Don't know/can't remember

Q40 **Please tell me if you agree or disagree with the following statements*?***
SINGLE CODE ONLY FOR EACH. [Agree, Disagree, Don't know, N/A]
(ASK Q40a-c ONLY IF CODES 3-7 AT Q14)

a. I was informed about my cancellation rights
b. My cancellation rights were not made clear by supplier/contract
c. I was unable to return the product even though I was within my cancellation period
d. I felt pressured to purchase the product by the salesperson/supplier
e. I was provided with accurate information on the quality, functions and price of the product
f. The sales process was fair
g. I received an unsolicited telephone call/visit from salesperson which led to me purchasing the product
h. Some of the information I was given by the salesperson/supplier turned out to be inaccurate
i. I was pressured to purchase a maintenance contract or extended warranty by the salesperson/supplier
j. I was provided a written agreement which reflected what was verbally agreed with the supplier/salesperson

ASK Q41 IF AGREE TO ANY OF STATEMENTS b, c, d, g, h, i. OTHERS GO TO Q42

Q41 **Did you report any of these issues to anyone such as Consumer Direct, Trading Standards etc.?** SINGLE CODE ONLY

1. Yes, Consumer Direct
2. Yes, Trading Standards
3. Yes, other body
4. No
5. Don't know/can't remember

Section 3 - Post-sales Experience

ASK ALL

Q42 **How satisfied or dissatisfied are you with?**
SINGLE CODE ONLY FOR EACH. SCALE [Very satisfied, fairly satisfied, neither satisfied nor dissatisfied, fairly dissatisfied, very dissatisfied, don't know/can't remember]. ROTATE ORDER OF STATEMENTS

a. The purchase price of the mobility aid
b. The overall cost of the mobility aid, including repairs, servicing etc.
c. The quality of the mobility aid
d. The product information before the purchase was made

ASK FOR EACH DISSATISFIED WITH AT Q42 a-d. OTHERS GO TO Q44

Q43 **Why do you say you are dissatisfied with?** BRING IN CODE AND RECORD

ASK ALL

Q44 **Do you think you should have purchased…?** READ OUT. SINGLE CODE ONLY

1. A more basic model or product
2. A more advanced model or product
3. Or do you feel the one you purchased was about right
4. Don't know

Q45 **Overall, how suitable do you consider the product you purchased to be?**
SINGLE CODE ONLY

1. Very suitable
2. Fairly suitable
3. Not very suitable
4. Not at all suitable
5. Don't know

Q46 **Do you consider the product you purchased to be good value for money?**
SINGLE CODE ONLY

1.	Yes	GO TO Q47
2.	No	GO TO Q46a
3.	Don't know	GO TO Q47

Q46a Why do you say that? PROBE FULLY

Q47 AND Q48 REMOVED

ASK Q49a IF MULTIPLE EXPERIENCES (CODE 2) AT Q7. OTHERS GO TO Q50

Q49a Have you ever purchased this type of mobility aid before? SINGLE CODE ONLY

1. Yes
2. No
3. Don't know/can't remember

ASK Q49b IF YES. OTHERS GO TO Q50

Q49b Have you purchased the same brands as before? If no, why? SINGLE CODE ONLY

1. Yes
2. No (SPECIFY)
3. Don't know/can't remember

SECTION 4 - Classification

Q50 Do you consider the *<bring in code 1-7 from SQ1 OR SQ2 if single code* ***OR*** *from Q1 if multicode at SQ1 OR SQ2>***to be a necessity to you/person purchasing for, or a convenience?** SINGLE CODE ONLY

1. Necessity
2. Convenience
3. Don't know

Q51 Are you able to access the internet? SINGLE CODE ONLY

1. Yes
2. No
3. Don't know

ASK Q52 IF CODE 1 ATQ51 AND CODE 2 NOT CODED AT Q12

Q52 Do you/have you accessed the internet to search for information on mobility aids? SINGLE CODE ONLY

1. Yes
2. No
3. Don't know

ASK ALL

Q53 **Was the** *<bring in code 1-7 from SQ1 OR SQ2 if single code **OR** from Q1 if multicode at SQ1 OR SQ2>***funded…?** SINGLE CODE ONLY

1. From private funds
2. By a charity
3. By the NHS
4. Part funded by NHS, part funded privately
5. By social services
6. Other (SPECIFY)
7. Don't know
8. Refused

Demographics

Q54 **Which of the following age groups do you fall into?** READ OUT. SINGLE CODE ONLY

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75-84
8. 85+
9. Refused

Q55 **What is your current marital status? Are you…**READ OUT. SINGLE CODE ONLY

1. Single
2. Married/cohabiting/ civil partnership
3. Widowed/separated/divorced
4. Refused

Q56 **Which of the following best describes your current working status?** READ OUT. SINGLE CODE ONLY

1. Work full-time
2. Work part-time
3. Not working but seeking work
4. Temporarily unemployed/sick
5. Not working and not seeking work
6. Retired
7. Student
8. Refused

Q57 Would you say you live in an urban, rural, suburban/semi-rural area? SINGLE CODE ONLY

1. Urban
2. Rural
3. Suburban/semi-rural
4. Don't know

Q58 How would you describe your ethnic background? DO NOT READ OUT. SINGLE CODE ONLY

1. White: British
2. White: Irish
3. White: Any other White background
4. Mixed: White and Black Caribbean
5. Mixed: White and Black African
6. Mixed: White and Asian
7. Mixed: Any other Mixed background
8. Asian or Asian British: Indian
9. Asian or Asian British: Pakistani
10. Asian or Asian British: Bangladeshi
11. Asian or Asian British: Any other Asian background
12. Black or Black British: Caribbean
13. Black or Black British: African
14. Black or Black British: Any other Black background
15. Chinese
16. Other
17. Refused

Q59 What is the occupation of the main income earner in your household?
CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS.IF PENSIONER/RETIRED PROBE FOR PREVIOUS OCCUPATION. RECORD DETAILS AND SINGLE CODE

1. A
2. B
3. C1
4. C2
5. D
6. E
7. Refused

Q60 Please can you tell me, do you…? READ OUT. SINGLE CODE ONLY

1. Own your home outright
2. Own your home with a mortgage or loan
3. Rent your home from a local authority
4. Rent your home from a housing association
5. Rent your home from someone else
6. Live rent free
7. Refused

Q61 Gender. SINGLE CODE ONLY

1. Male
2. Female

Q62 The OFT and SPA Future Thinking may wish to undertake further research with the findings of this study in the next few weeks.

Would you be happy for SPA Future Thinking or OFT to contact you to ask if you are willing to take part in a more detailed interview building on some of your responses to this survey?

1. Accept
2. Decline

IF CODE 1 ACCEPT, RECORD:-

PERSONS NAME
TELEPHONE NUMBER USED OR ALTERNATIVE
ADDRESS (MERELY TO CHECK WHETHER WOULD BE A FACE-TO-FACE INTERVIEW OR TELEPHONE)

Thank and close